



**Ocorian's 2026  
Global Family Office  
Report**

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# Introduction

Across our private wealth offering, there is perhaps no area more dynamic than the family office. Over the past decade, wealth management has undergone a quiet but profound evolution—from highly personalised, concierge-style stewardship of family affairs to globally integrated institutions offering sophisticated capabilities across multiple jurisdictions and touchpoints.

Today's complex private client landscape demands sophistication, globalisation and connection. Family offices have had to professionalise rapidly as a result of their growth but also because of both market and client demand. But what should not be forgotten is that no matter how institutionalised systems, processes and governance become, we're still talking about the assets of families. Real people who have generated, multiplied, safeguarded, invested, distributed and managed their wealth with care and passion precisely because it is theirs.

For the 2026 edition of Ocorian's Global Family Office Report, we've conducted a global survey that asks questions of those who have family offices and those who work with them. We wanted to know about global growth, current challenges, changing family priorities, the impact of technology and geopolitics, and the role of specialist service providers in knitting all of this together.

We've worked with some specialist partners across these areas, and I'm grateful to them for their insights and expertise paired with my private client colleagues all over the world have also provided vital knowledge and input.

The Ocorian Global Family Office Report 2026 is based on collaboration, understanding and alignment and highlights that keeping family offices personal requires more trust, emotional intelligence and market knowledge than ever before.

## Research background

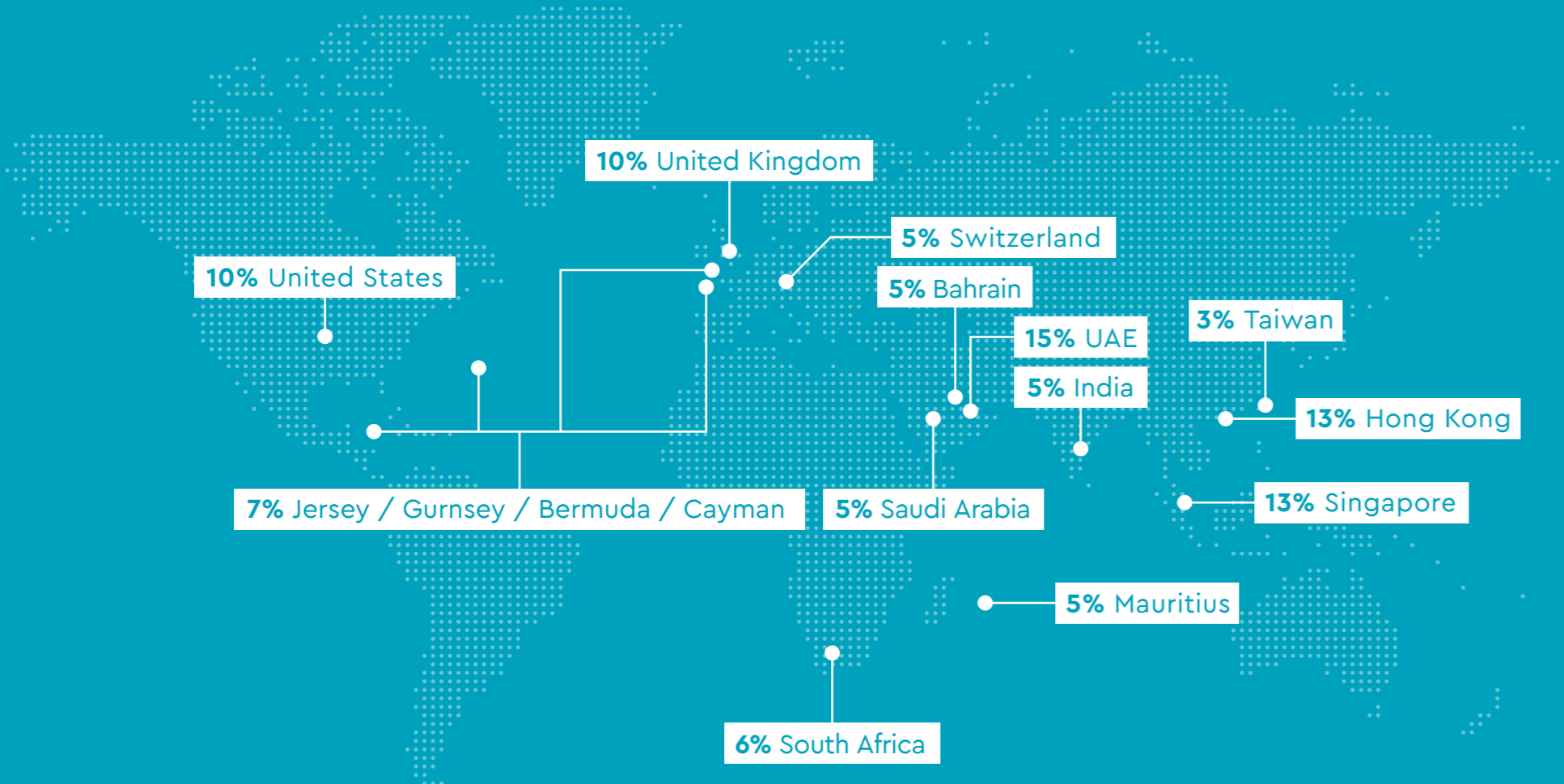
The research was conducted by independent research agency PureProfile. It asked 34 questions in total and was completely anonymous – respondents didn't know the survey was Ocorian led. It was completed by 200 respondents in total who all outsource to third-party service providers. Respondents were from both single and multi-family offices and help to manage over \$100 million or more of family wealth.



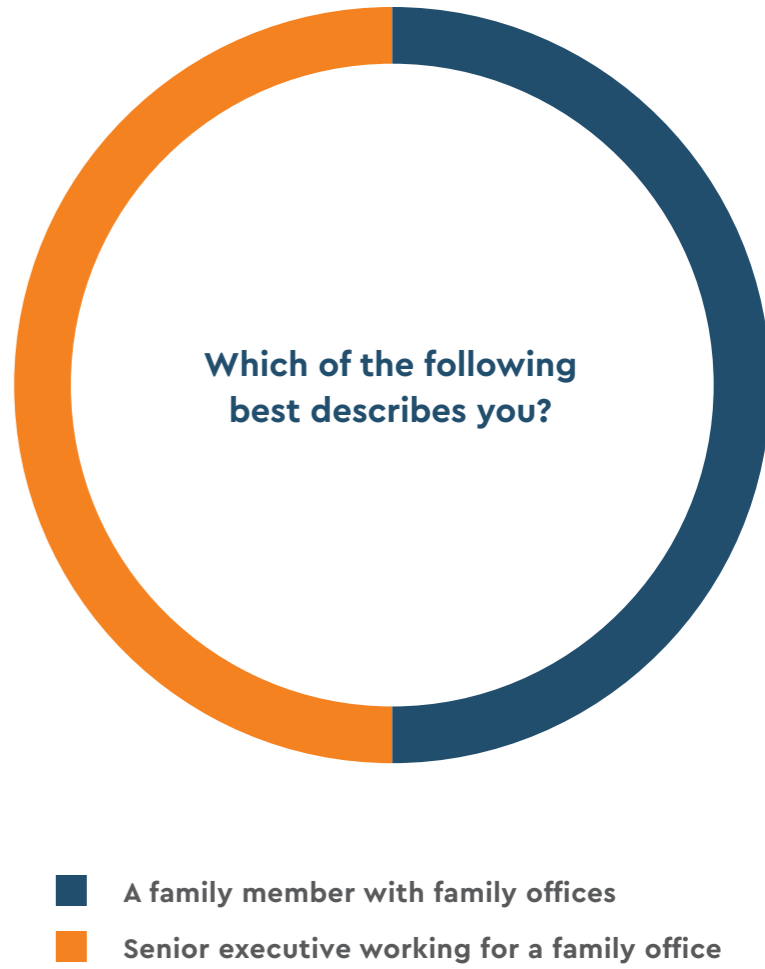
**Annerien Hurter**  
Global Head of Private Client,  
Ocorian



# Respondents by geographic region



# Profile of respondents

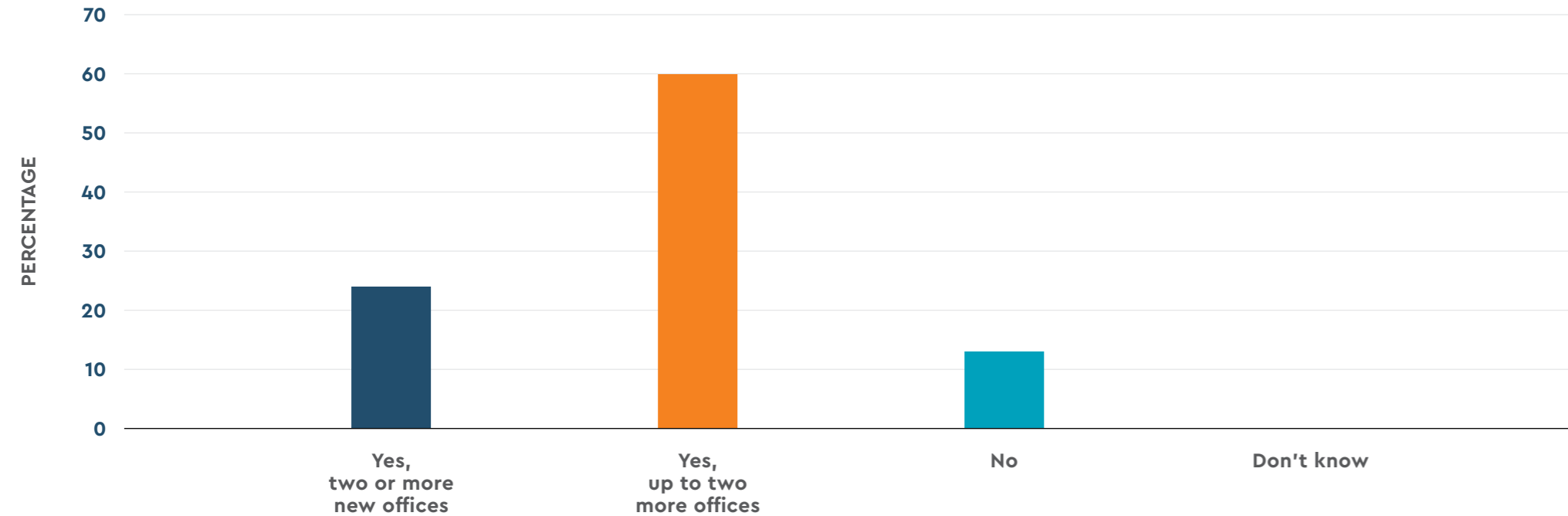


# The evolving profile and global footprint of Family Offices

As family offices have had to manage greater levels of complexity, assets and wealth, it stands to reason that their very makeup has had to evolve to meet this need.

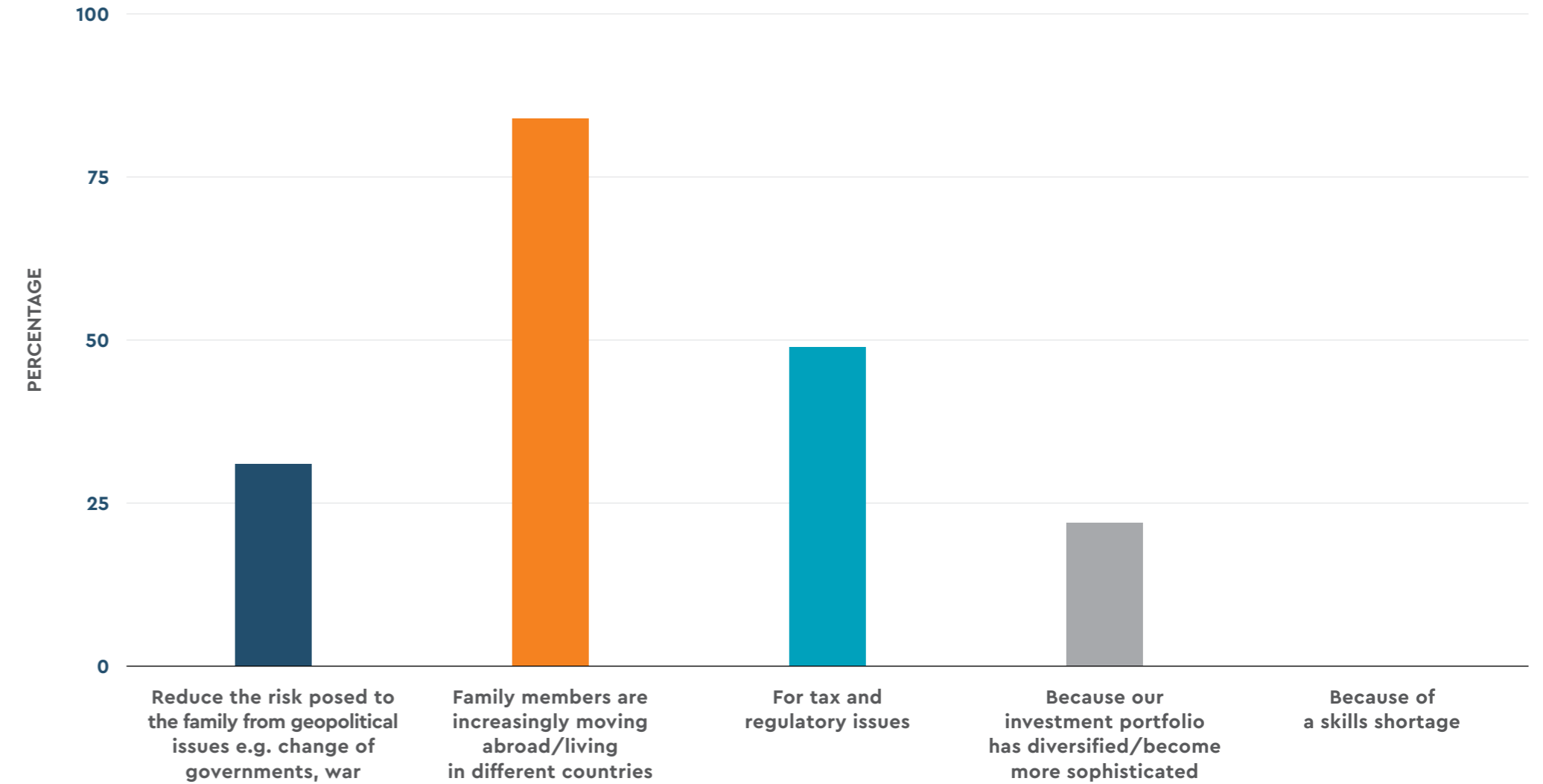
One of the biggest drivers changing the profile of family offices is the geographic dispersal of families. For UHNWIs the world can be a small place, easily navigated and available depending on any given desire or need, whether business or personal. 60% of respondents to our survey said they had opened up to two more physical offices in different jurisdictions in the last five years.

## Over the past five years, has your family office opened more offices in different jurisdictions?



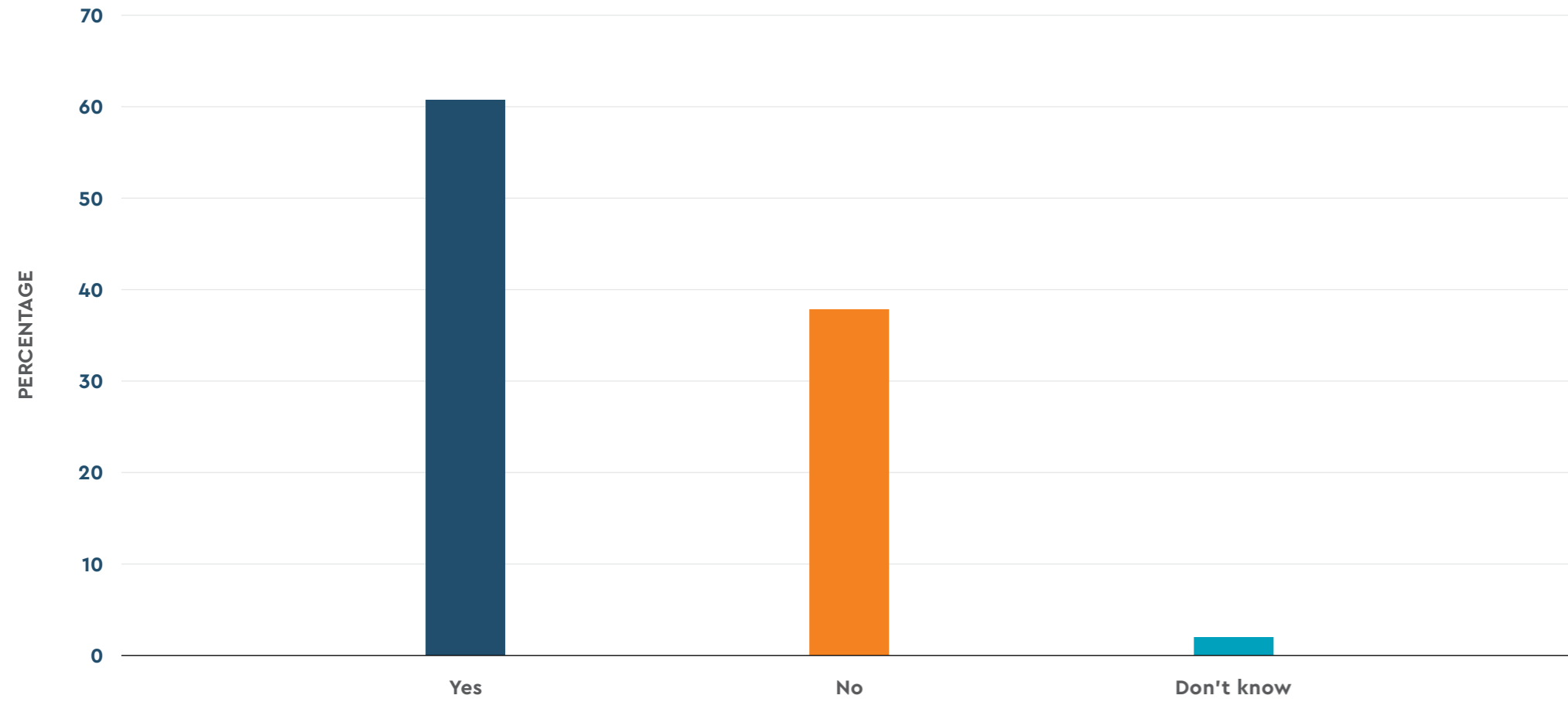
Why? Family members moving or living abroad was the most popular reason (84%), followed by tax and regulatory issues (49%) and reducing risk posed by geopolitical issues (31%).

## If it has opened more offices, why is this?



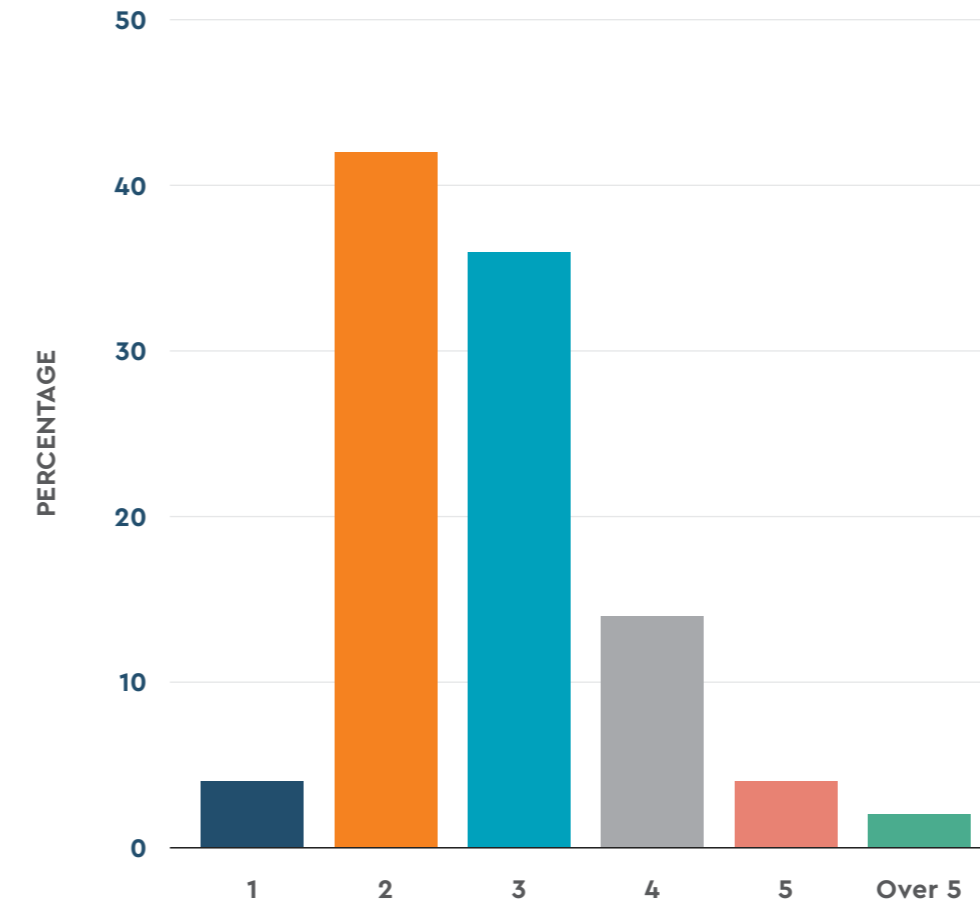
Global mobility is a trend – 61% of respondents said they had seen an increase in family members having different or multiple citizenships in the last five years, or an increase in them residing in different countries. And why not? For many families and UHNWIs mobility is one of the greatest luxuries afforded by wealth, personal and lifestyle needs can be best met in different countries, cities or locations.

### Over the past five years, have you seen an increase in family members having different or multiple citizenships and / or seen an increase in them residing in different countries?



Situating your family office where you most regularly are is a logical move, and one that we've worked with many intermediaries and end clients on achieving. It's not a stretch to say that this is now the norm; 96% of respondents to our survey have more than one physical office.

### How many physical offices does your family office have?

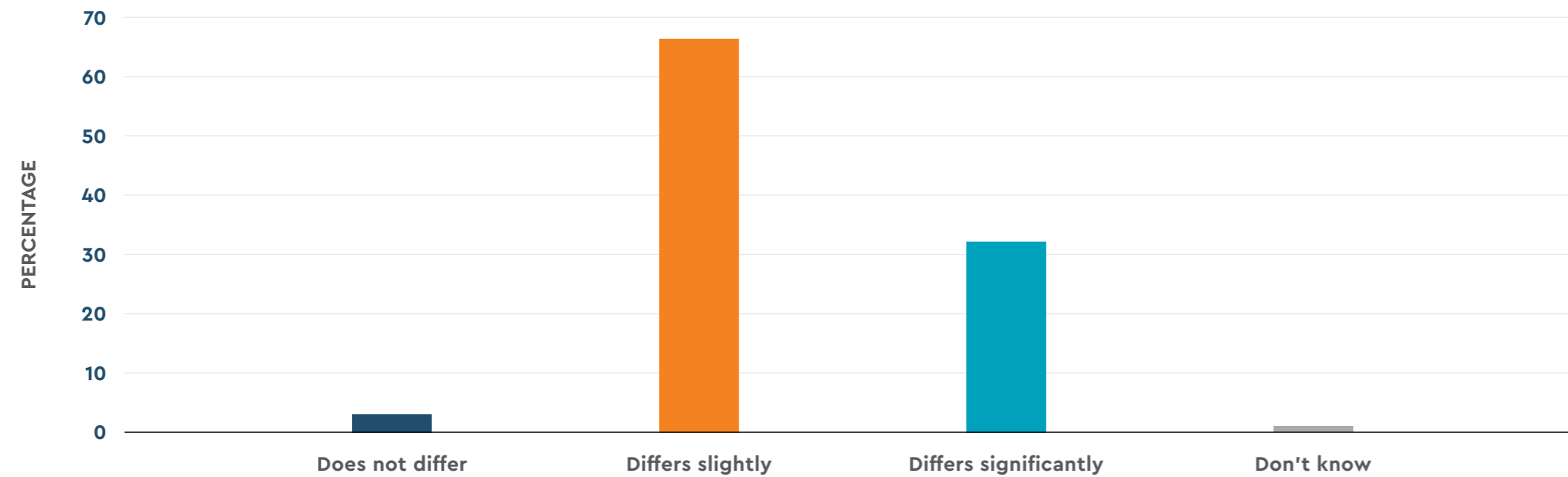


## Navigating current challenges and demands

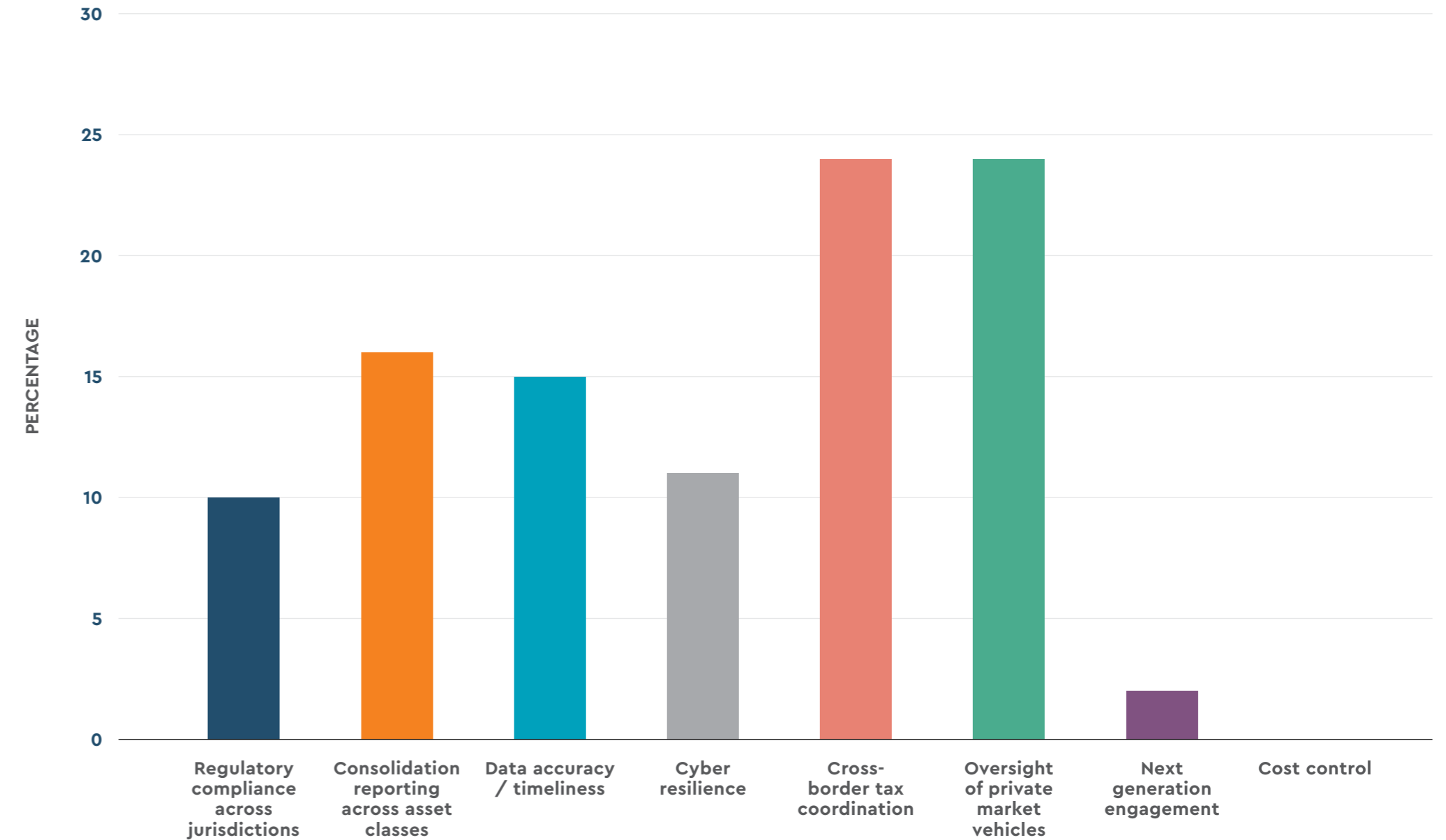
When it comes to current trends in the family office space, many of the challenges of 2026 are continuations of those of preceding years. Hardly surprising when the very nature of a family office is a long-term, multi-generational concern. However, it is important to note that our 2026 family office survey was completed before the recent tensions in the Middle East, which would almost certainly have led to changes in demands and challenges as a result of these global events.

Succession planning and differing approaches between generations feature highly whenever concerns are discussed (98% of respondents agreed that the approach and priorities of the next generation differ from the founding generation), but there are more practical challenges for many of our respondents; 24% said that cross-border tax coordination and oversight of private market vehicles were the areas they currently felt most challenged to deliver in, with consolidation reporting across asset classes being the third-most-selected option (16%).

### How widely does the approach and priorities of the next gen differ from the founding/originating generation?

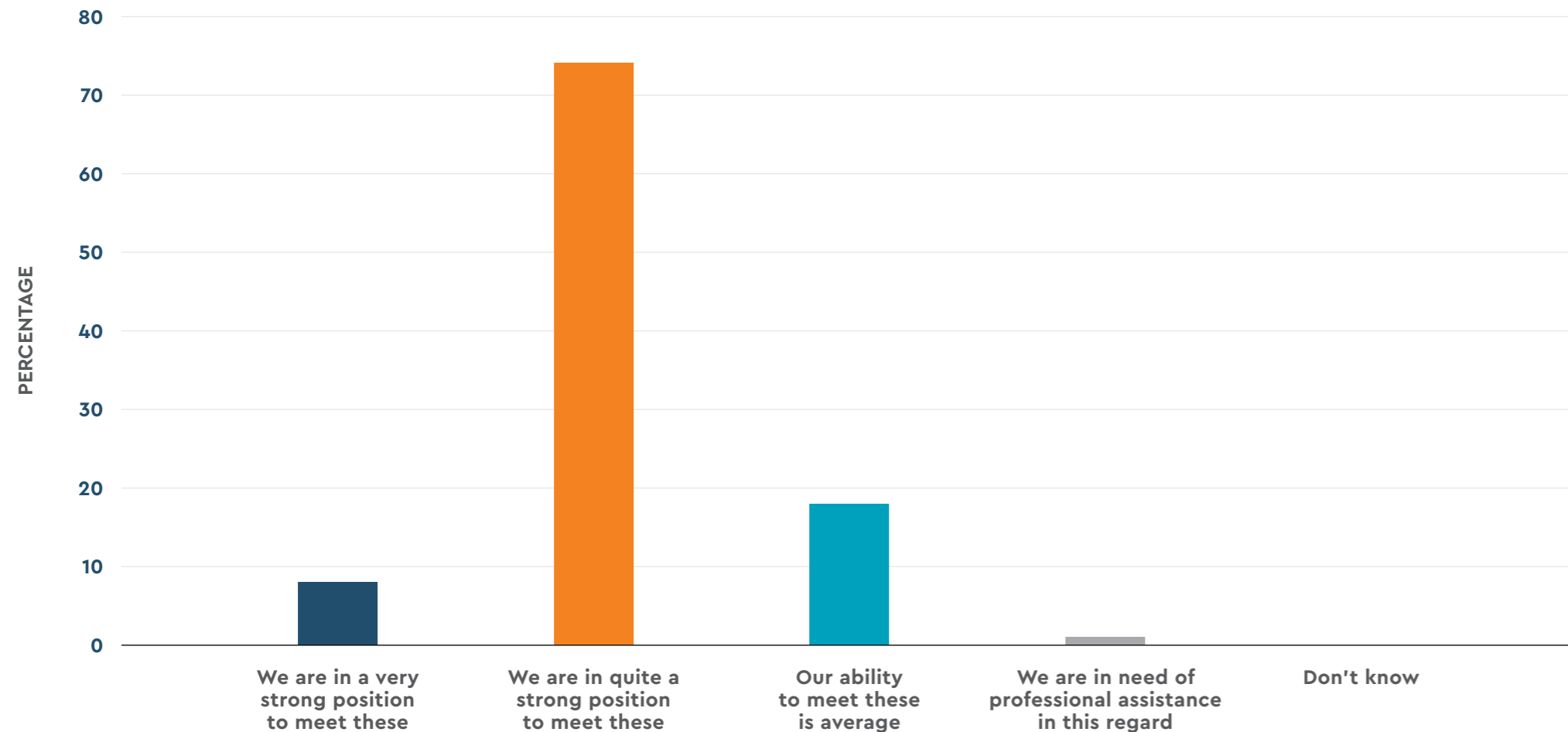


### In what area does your family office currently feel most challenged and stretched to deliver the level and quality of expertise it requires to operate effectively?



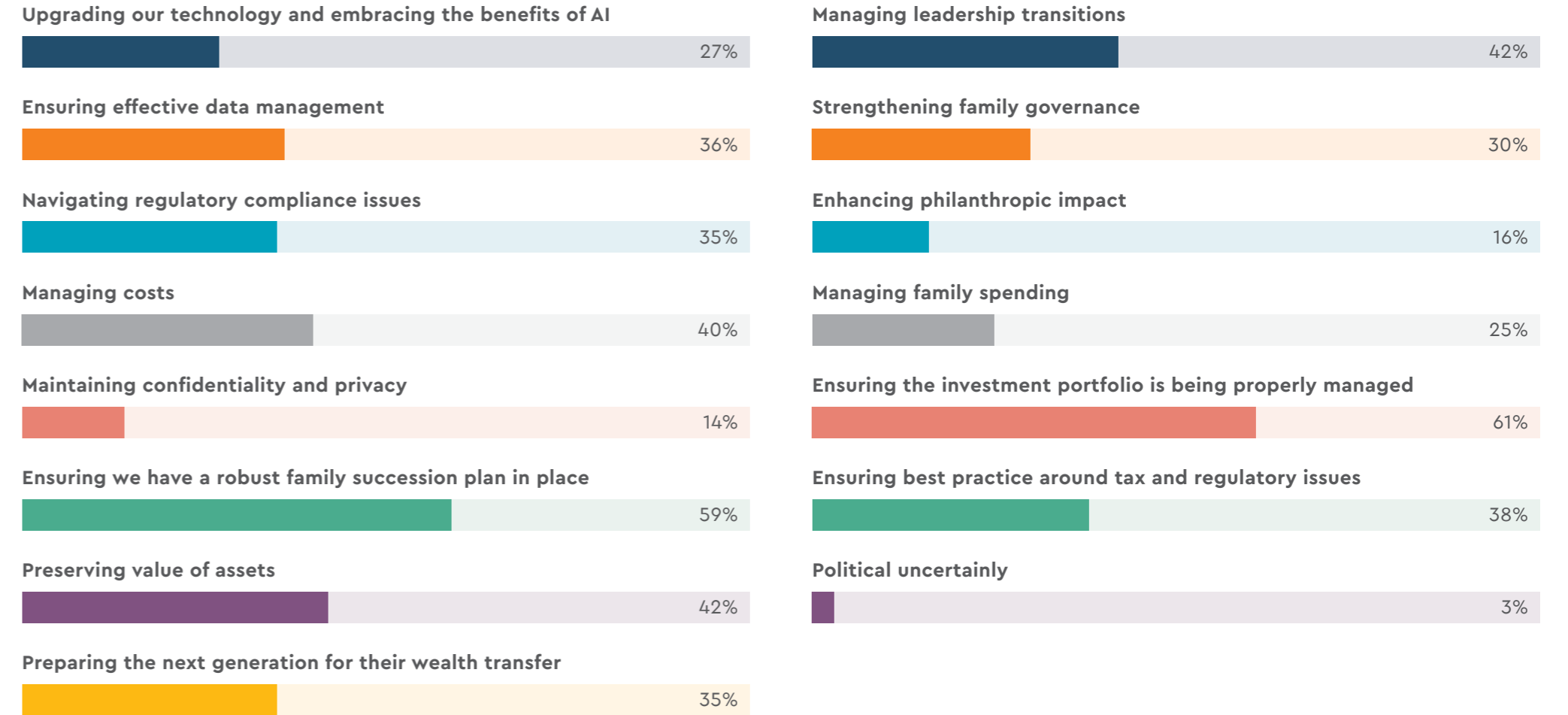
Interestingly, the challenges and demands of regulation seem to have been integrated successfully in the day-to-day operations of family offices. The majority of respondents to our survey (82%) are confident and said they were in a 'strong' or 'very strong' position to meet regulatory demands.

### Global regulatory demands facing family businesses / family offices are constantly changing and increasing in complexity. To what extent do you feel well advised and well equipped to meet the regulatory demands you are facing?



Away from the external challenges of the ecosystem, internal challenges were broadly around 'family management'. When we asked respondents to pick the most important challenges to address, having a robust succession plan was the second most popular option (59%), and top of the pile was proper management of the investment portfolio (61%), suggesting that increased oversight from families and a complex investment landscape in recent times are proving barriers to good service.

### Below are some of the biggest challenges facing family offices.



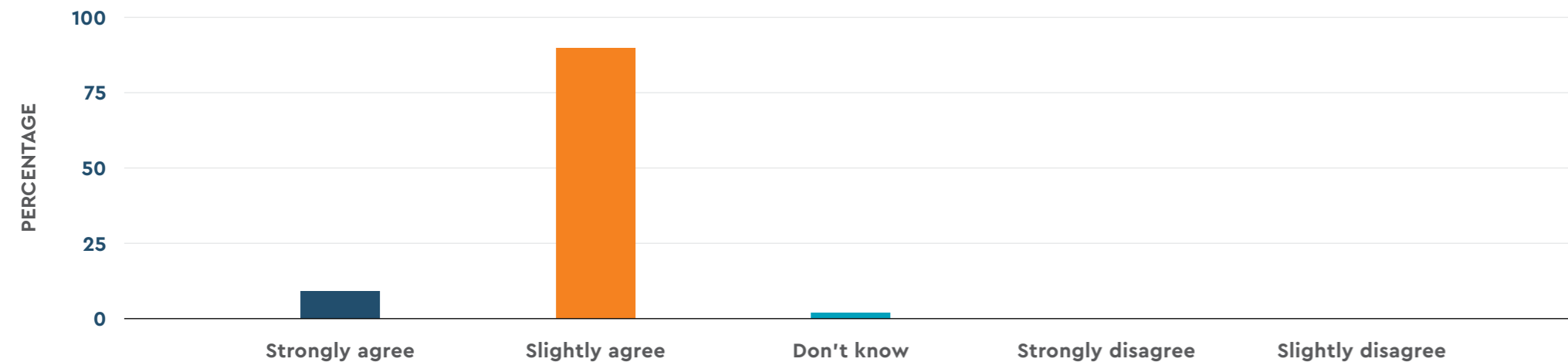
## Responding to shifting priorities in a dynamic landscape

The private wealth landscape is dynamic and requires family office professionals and service providers to increasingly play the role of forecaster, news commentator and analyst. Alongside this undoubted expertise comes the requirement to remember that family offices are personal concerns for the end clients, and managing their expectations and needs is a vital part of the job.

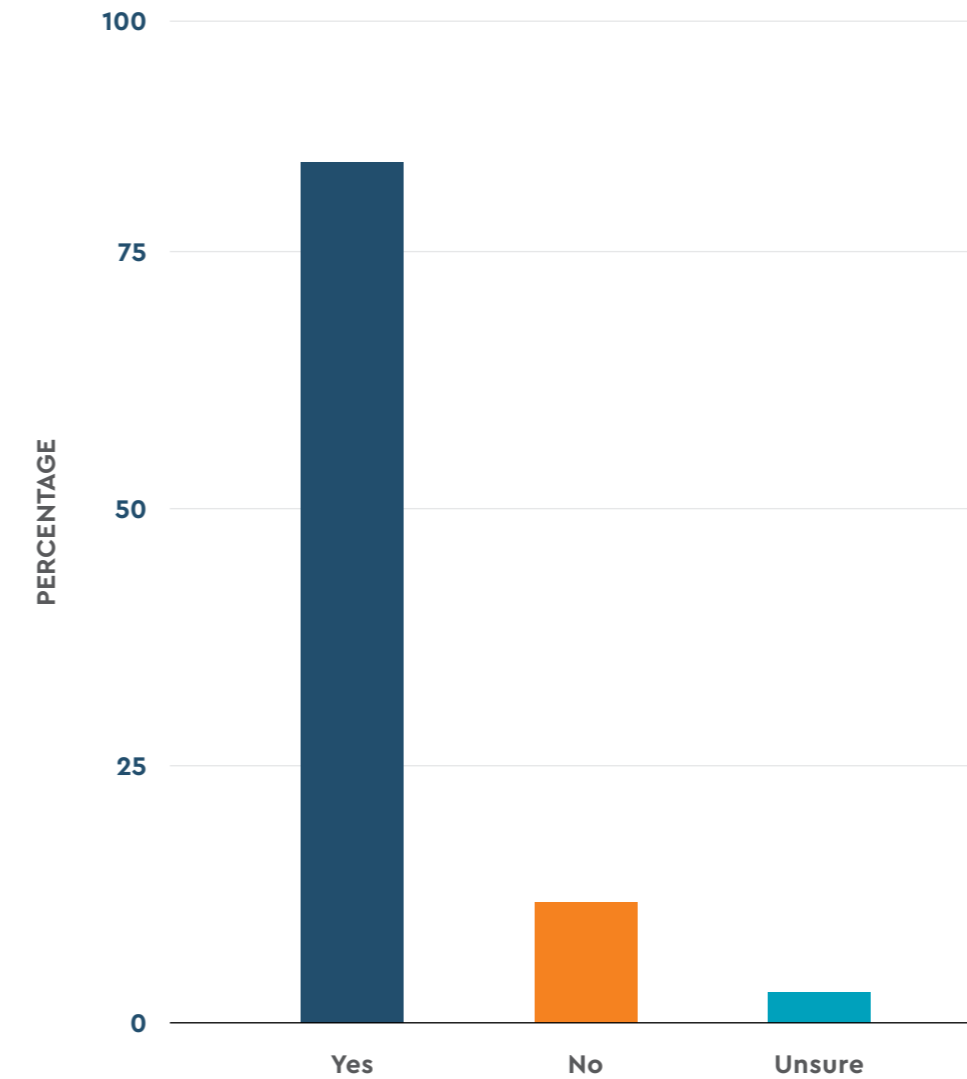
In our work with intermediaries and family offices we constantly see the need for empathy, level-headedness and mediation as tools to get results. Much of this comes from the differences between generations mentioned in chapter 2.

Inter-generational relationships are the cornerstone of long-term success for family offices, and 99% of respondents to our survey agreed that more needs to be done around succession planning. This presents something of a paradox considering 86% also felt there was a natural succession plan in place in their family office. But it also speaks to the crucial journey that providers need to take families on: from knowing they need a plan, to assuming that there is a plan, and finally to actually having a robust plan.

### As more family offices manage significant wealth, there is a growing realisation that more needs to be done around succession planning. How strongly do you agree or disagree with this view?



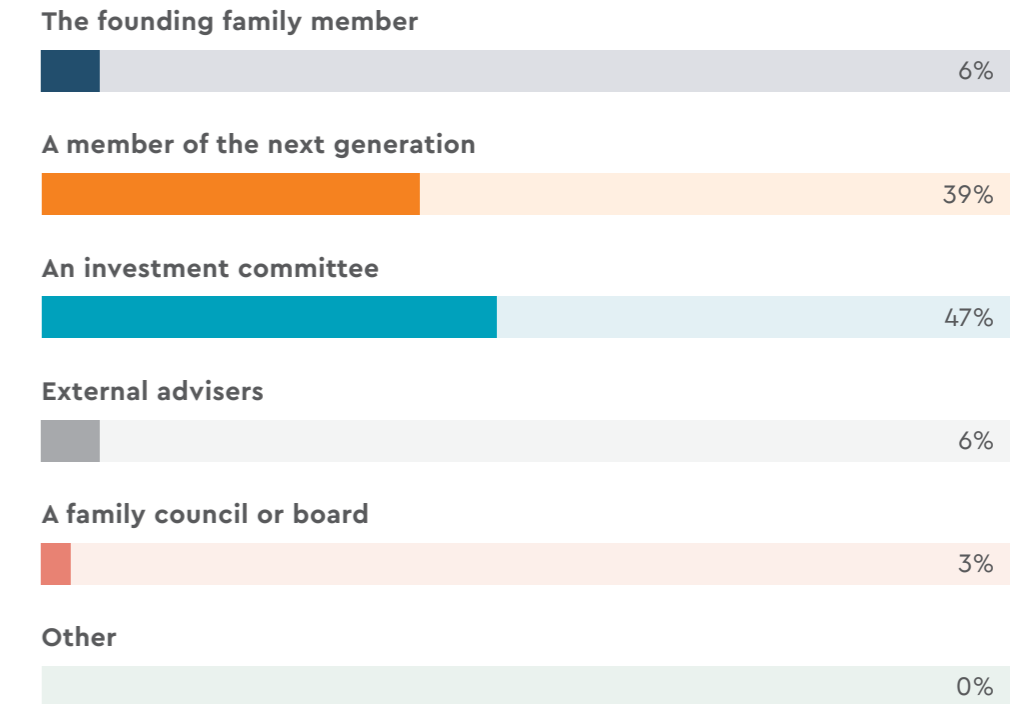
### Are you seeing a natural succession of wealth and leadership within the families you manage the wealth of / are part of?



What is certain is that the next generation is becoming more involved.

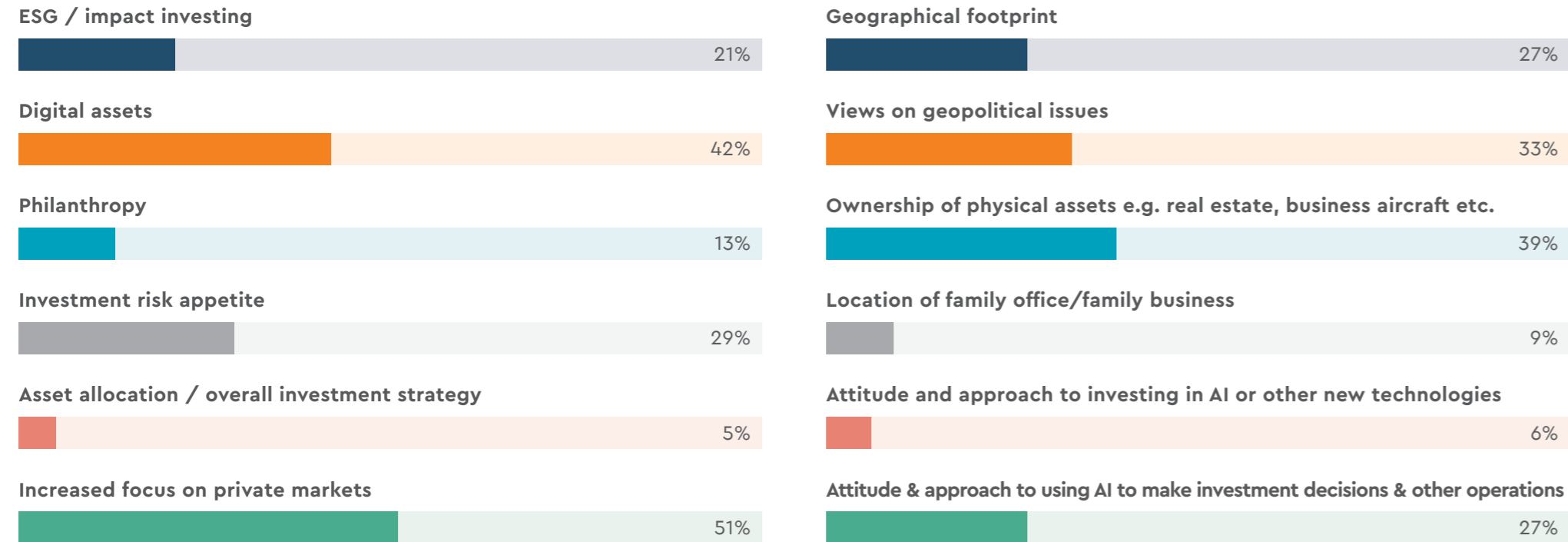
When it comes to investment 79% said that the next generation are 'more' or 'much more' involved in developing or reviewing strategies. For 39%, the next generation family member is actually the ultimate decision maker when it comes to major investments or structuring/restructuring. An investment committee is still the norm, but only just at 47%.

### Who within your family / the families you help manage the wealth of is the ultimate final decision maker when it comes to major investments or structuring / restructuring?



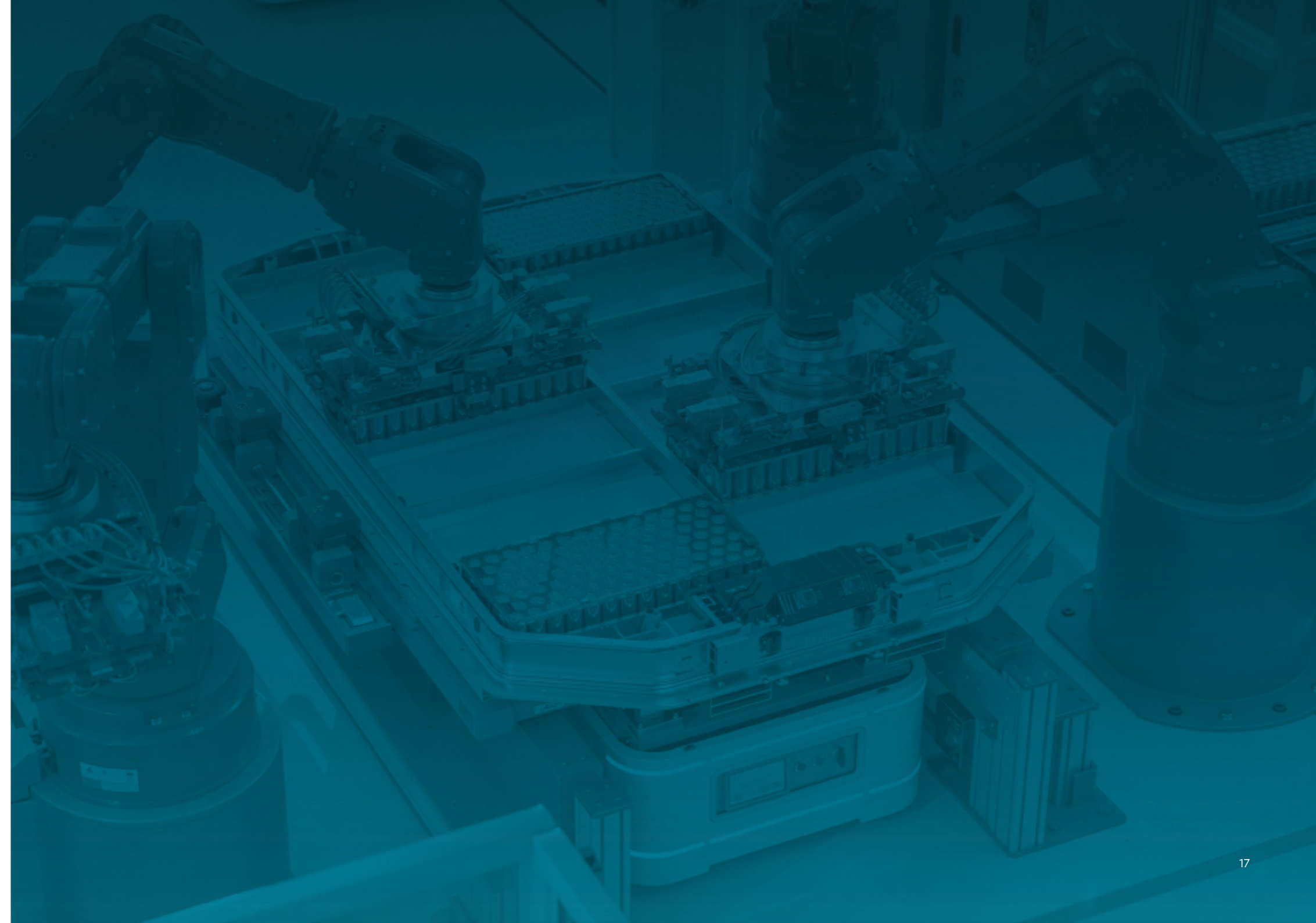
This speaks to greater engagement, a desire for control and a hands-on approach that is inevitably changing how providers interact with family offices, and how family office professionals themselves structure their approaches.

Materially, the areas pulling the greatest focus from the next generation's differing approach and priorities are:



Report contributor BDO delves into the geopolitical element of these in chapter 4, but the top three selected areas shouldn't be a surprise to readers. Private markets are very on-trend especially among next generation family members who have a different risk appetite and are hungry for the potential gains and exposure to themes like AI and infrastructure investing which are significantly privately backed.

Ownership of physical assets is an surprising third choice, as we do not observe the same focus among the rising generation in our work. Many recognise that real assets are a fundamental pillar of wealth, yet these are typically inherited and, as such, tend to fall lower in priority. The lack of direct control and the fact that real assets are longer-term, generational holdings—unlike digital or liquid assets—means they are less actively managed by the next generation.



# Geopolitics: What does this mean for Family Offices?

## Insights from BDO

**“Tell me how this ends?” – General David Petraeus (Retired), 2003.**

Despite progress in the Omani mediated negotiations, on 28 February 2026, the US and Israel launched strikes against Iran. The opening strikes killed Ayatollah Khamenei, Iran’s ruler since 1989, along with an array of other Iranian leaders.

The operational rationale was clear: Iran’s air defences and ballistic missile programme remained degraded from strikes in June 2025; key Iranian proxies, including the Syrian Regime, are destroyed; and the direct physical risks to both the US and Israel were low. Finally, the Iranian leader’s location was evidently known.

However, the strategic rationale and objectives, at least for the US, remain less clear. It is difficult to answer the question of how this ends: with regime change, when Iran is ground to dust, or when petrol price increases in the US force a change in approach?

The US and Israeli action is perhaps the sharpest illustration of a re-emerging global paradigm where strategic competition between nation states is displacing collaboration, co-operation and consensus building. Sovereign states are once again using traditional hard (military) as well as soft (diplomatic) power to project influence, seek advantage and pursue shifting national interests. States are also using the full spectrum of cyber, economic and regulatory capabilities as levers with which to gain an advantage.

States are proving more willing to use force and regional powers are prepared to act without consulting traditional allies. In 2025, localised conflicts erupted, almost without warning, in Africa, the Middle East, South Asia and Southeast Asia. So far in 2026: the US has launched military action against Venezuela and Iran; Pakistan and Afghanistan have skirmished; Ethiopia is massing troops on its border with Eritrea; and Russian casualties in Ukraine passed 1.2 million.

Global trade and supply routes are threatened by instability, as is communications infrastructure. The ongoing conflict in the Gulf highlights the criticality of seaborne energy supplies, with Asia, African, and European economies particularly susceptible to disruption. Moreover, laws and regulations are increasingly being weaponised as tools with which to compete. Tariffs, inspection standards, sanctions, travel bans and tax regimes are becoming harder to navigate and are all susceptible to swift and sudden political change.

**BDO**

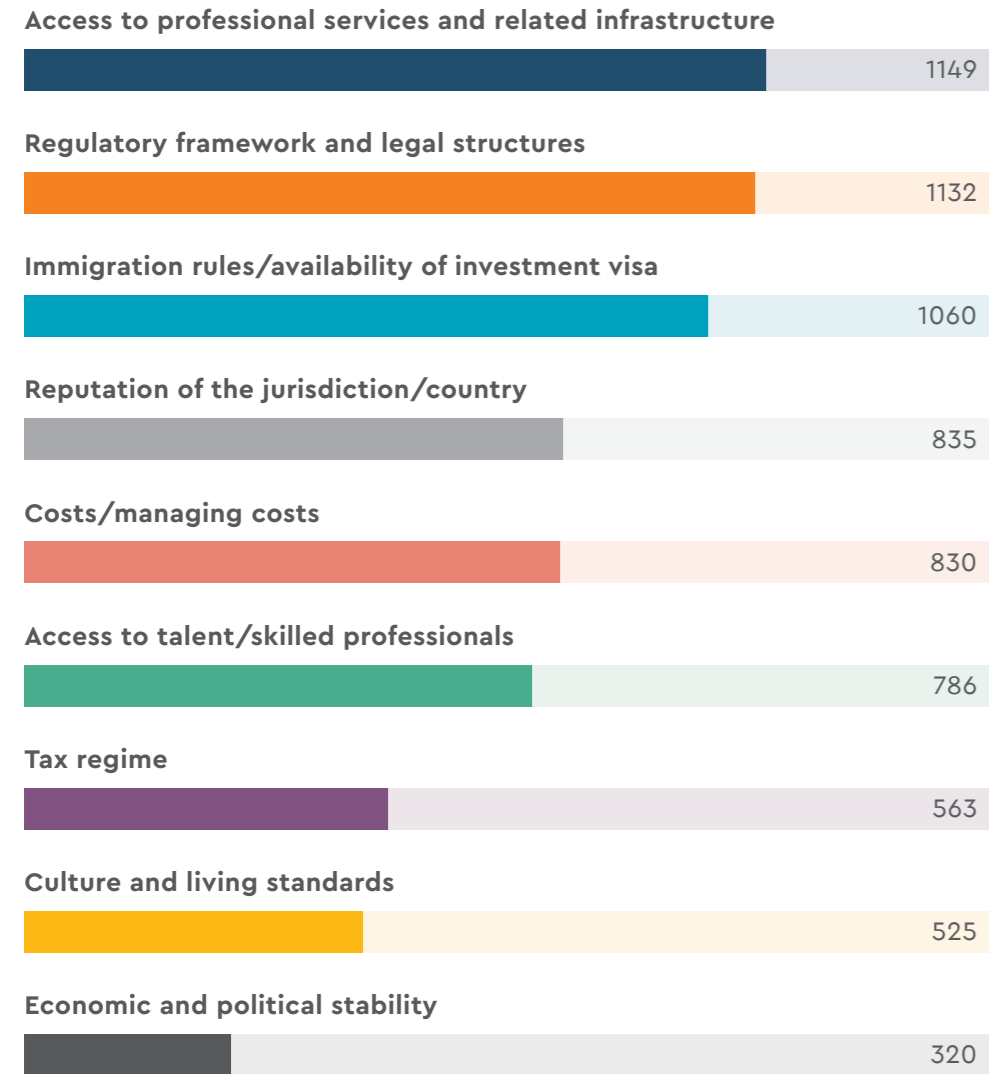


This global strategic competition is underpinned by long term demographic, technological and environmental drivers of change. Populations across much of the developed world are ageing and declining, shrinking workforces to stress economies. Agricultural land is an increasingly scarce and valuable resource. Technological advancement is relentless and unexpected, with automation, robotics and artificial intelligence set to transform societies and economic models.

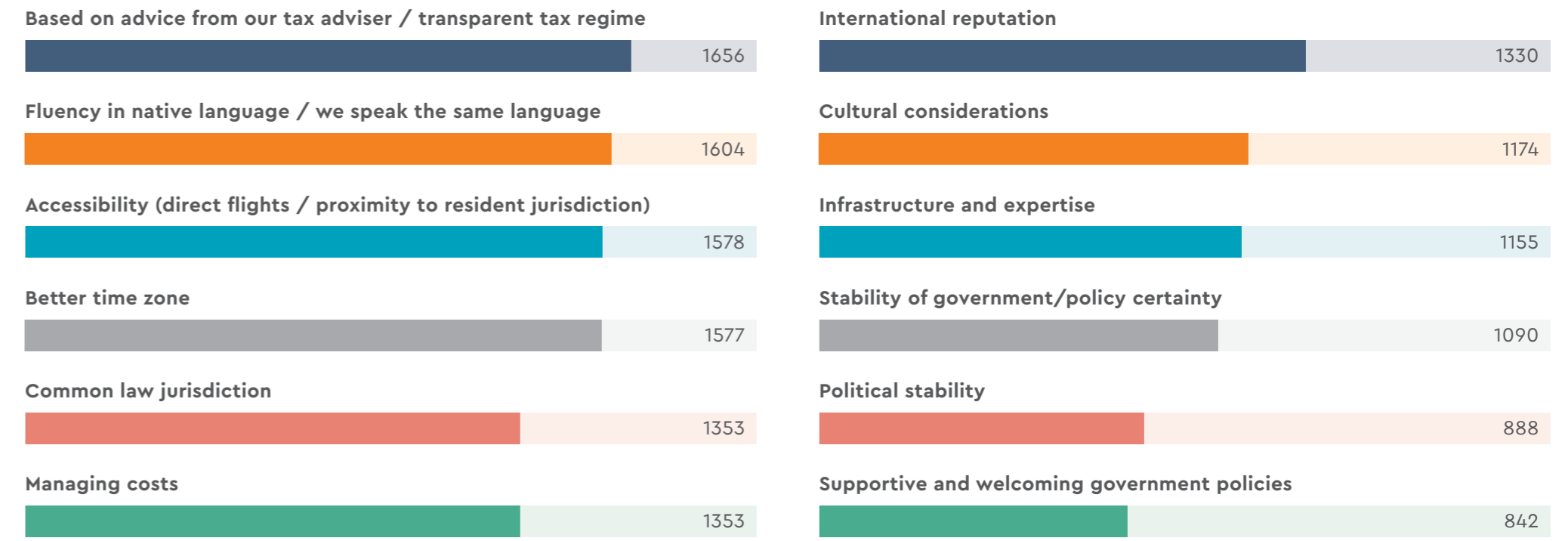
These are all considerations for Family Offices. While each Family Office is unique, as the Ocorian survey highlights, most are global in outlook and nature. Assets, investments and underlying businesses are distributed across the globe, as are the Family Offices themselves. Many assets and investments rely on supply chains which could be suddenly disrupted or unexpectedly drawn into conflict zones. There is also the personal impact for Family Offices, whose principals and staff may be directly affected by conflict and instability; this can understandably impact on governance, direction and decision-making.

Global strategic competition, driven by demographic, technological and environmental change, is reshaping how family offices manage risk, governance and long-term investment decisions.

Below are some of the issues to consider when deciding where to open a family office. These are rated in order of importance, starting with the most important first.



Below are some factors to consider when choosing a jurisdiction to structure your wealth. These are rated in order of importance, starting with the most important first



**“Tell Me How This Ends”**

The world is set for a period of friction, competition and conflict; this is likely to last into the 2030s. As with COVID and the Russian invasion of Ukraine in 2022, the ongoing conflict in the Gulf has created an immediate shock and illustrates again the global reliance on seaborne energy. We are almost certain to see further strategic, economic and operational shocks as countries increasingly choose to roll the dice and pursue military or confrontational options to resolve issues. Conflicts might remain regional and contained, but our collective interdependence means their consequences will be global.

However, the world adapted to COVID and the war in Ukraine. Supply chains were re-aligned and alternative supplies sought. Governments made efforts to bring inflation under control, and crises were “priced into the market”. Uncertainty can be navigated, risks mitigated, and opportunities found, particularly by organisations which can be agile and adaptive.

Uncertainty can be navigated, risks mitigated, and opportunities found, particularly by organisations that are agile and adaptive.

Family Offices are well placed to do this and have levers which can be pulled. Asset bases can be reallocated, families and functions relocated, and investments diversified or bolstered. Family Offices have the network, resources, and strategic flexibility to take bold decisions and seize advantage of fleeting opportunities, whether by entering new markets, backing disruptive technology, or pivoting underlying businesses.

The starting point is understanding the global environment, leveraging the deep local and sector expertise that many Family Offices have developed over time, and finding the right advisors with whom to partner.

**Director Strategic Insight, BDO**  
**March 2026**



# Risk, resilience and the maturing Family Office

## Insights from Toro Solutions

Family offices have traditionally relied on discretion as a form of protection. Privacy, informal structures and lean teams were not weaknesses; they were deliberate choices. For a long time, that approach worked.

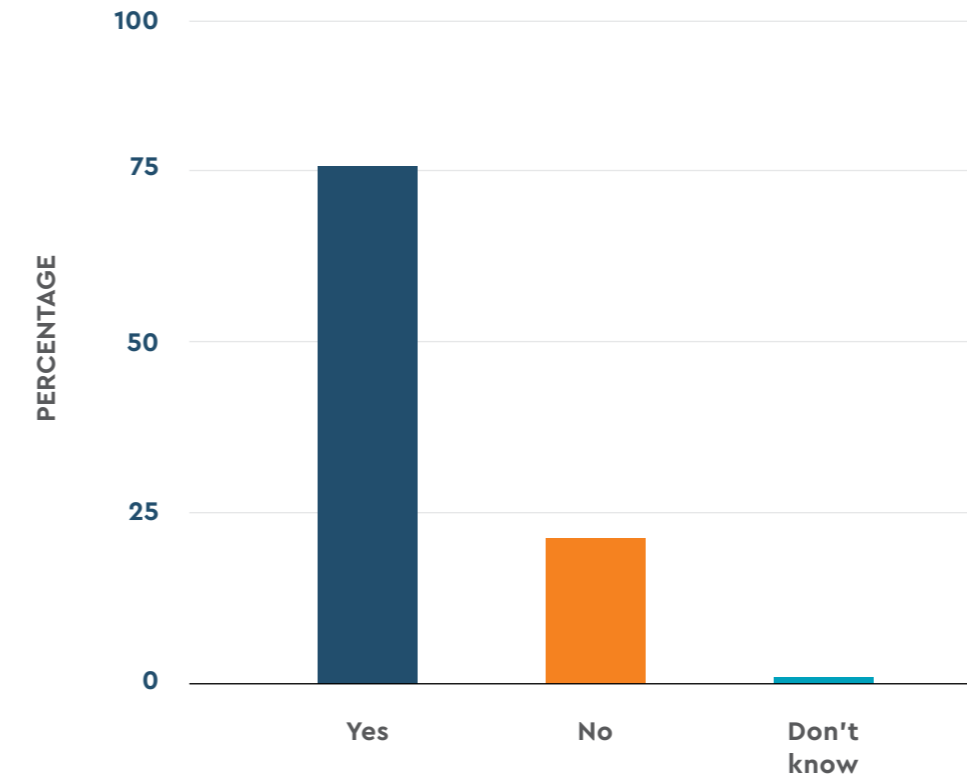
But the environment has moved on. The risks facing family offices today are broader and more interconnected than they were even a few years ago. Managing wealth is no longer only about investment strategy or financial oversight. It now means thinking carefully about cyber exposure, geopolitical tension, operational reliance on third parties and even how different generations engage with technology.

Ocorian's 2026 Family Office Survey captures a sector that is adjusting. The findings point to a sector in transition, one that has made real progress but still carries material vulnerabilities.

## The current cyber landscape

78% of respondents have a cyber incident response plan in place, and three quarters have strengthened their defences within the past two years. These are meaningful improvements.

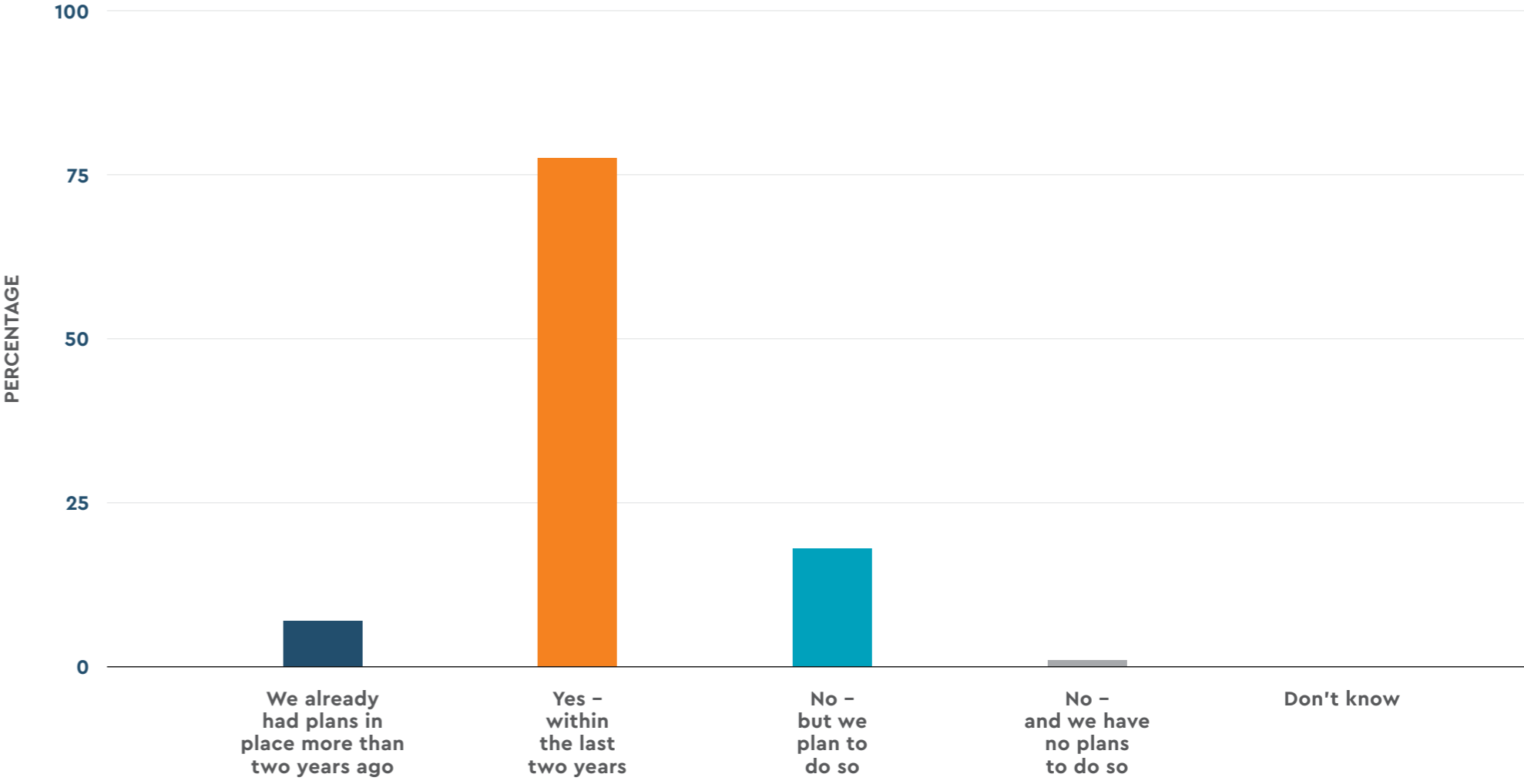
## Does your family office have a cyber incident plan in place to respond in the event of a cyber-attack?





The concern lies in the remainder. 22% either have no plan or are uncertain whether one exists. In a sector defined by concentrated assets, sensitive information and direct family exposure, that gap can carry real consequences. A Deloitte report estimated that 43% of family offices globally have suffered a cyberattack in the past year or two and of those, a third experienced tangible damage, whether financial loss or compromised data the theory that low-profile offices fly under the radar is no longer credible.

### Has your family office taken action to strengthen its defences against potential cyber attacks in the past two years?



# Toro Solutions

What separates rapid containment from prolonged disruption comes down to whether roles, escalation routes and decision rights are genuinely understood before something goes wrong. A plan that exists only on paper and has never been tested offers much less protection than it appears to.

## A more complex threat landscape

Family offices are, by their nature, attractive targets. They oversee significant pools of capital, frequently connected to operating businesses, property holdings and philanthropic interests, while operating with lean internal teams. That imbalance can leave them managing a level of digital and operational exposure that outweighs the resources available to oversee it.

The nature of the threat has shifted too. Attacks are no longer purely opportunistic or financially motivated. Organised crime and state-aligned activity have become harder to separate, and data theft increasingly serves strategic ends. A ransomware attack that looks financially motivated may be harvesting intelligence at the same time. For family offices connected to politically prominent principals or sensitive sectors, that changes how risk needs to be thought about and planned for.

Generational dynamics add another dimension. Younger family members live more visibly online. That is not the problem in itself, but it does expand the family's digital footprint in ways that need to be understood and managed, not restricted, but approached with a shared awareness of where the exposures actually sit.

## The coordination challenge

73% of respondents expect outsourcing to increase over the next three years. The drivers are familiar – demand for more sophisticated services, gaps in in-house expertise, cost pressure and growing risk appetite. A further 19% cite cyber security concerns directly as a factor pushing services outward.

Outsourcing does not eliminate risk. It spreads it across a wider and less visible set of relationships. When services are externalised, data moves with them. Administrators, custodians, technology providers and legal advisers access sensitive information under governance frameworks that may look quite different from the family office's own.

Managing this well requires more than onboarding questionnaires. It means maintaining active oversight of third-party relationships and making sure incident response planning accounts for the fact that a failure may originate outside the office itself. As outsourcing grows, knowing where data sits, how it moves and how a problem anywhere in the chain gets flagged and escalated becomes increasingly important.

## What resilience actually looks like

The pattern among family offices that handle incidents well tends to be consistent. Cyber and operational risk sits within governance structures with clear ownership at principal or board level. Third-party relationships are reviewed on an ongoing basis, not just at the point of onboarding. Incident response plans are tested under realistic conditions. The digital footprint of the office and key principals is monitored regularly, so exposure can be identified early rather than discovered after the fact.

This does not require complexity. It requires ownership, clarity and periodic testing.

Protecting wealth has always involved protecting relationships and reputation as much as capital itself. Today, information security sits firmly alongside those priorities. The family office model is not being undone by new risks, but it is maturing in response to them.



# Harnessing data, AI, and reporting for strategic decision-making

## Insights from Landytech

Family offices are becoming more sophisticated, more global and more complex. As this report highlights, they are evolving into institutional-grade organisations, yet many are still operating on fragmented data foundations.

This gap is becoming one of the defining challenges of the modern family office. Because while strategies are becoming more advanced, decision-making is often still constrained by incomplete, delayed or inconsistent data.

In an environment shaped by geopolitical uncertainty, private market exposure, and intergenerational change, this is no longer sustainable. The family offices

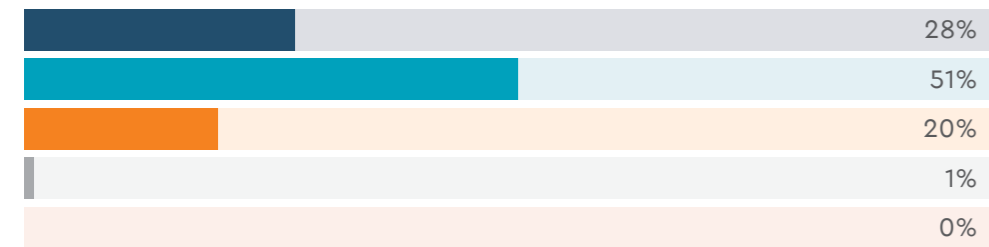
that will thrive over the next decade will not simply be those with the best access to opportunities, but those with the clearest, most reliable view of their data.

### From fragmented data to a strategic asset

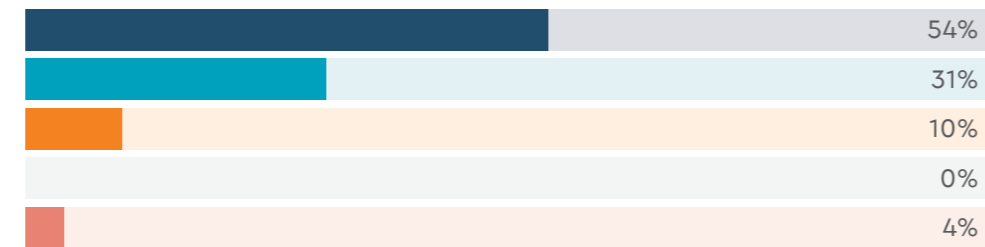
Survey insights point to a clear shift in priorities. As next-generation family members take a more active role, two thirds of respondents report an increased focus on governance, while 77% highlight greater use of AI in decision-making.

## Thinking about your family/the families you help manage the wealth for, are you seeing more or less of a focus from the next generation on the below as part of the investment strategy?

### Environmental, Social and Governance considerations

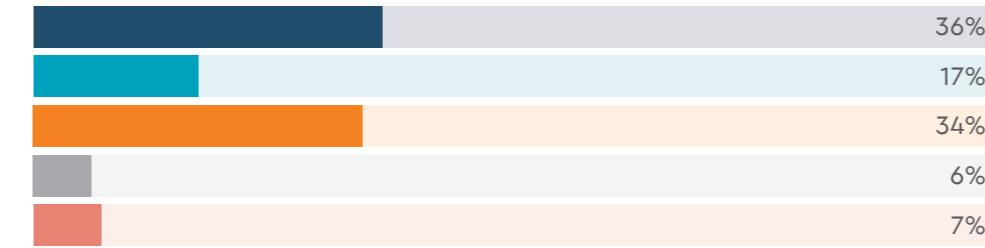


### The long-term sustainability of the Family Office

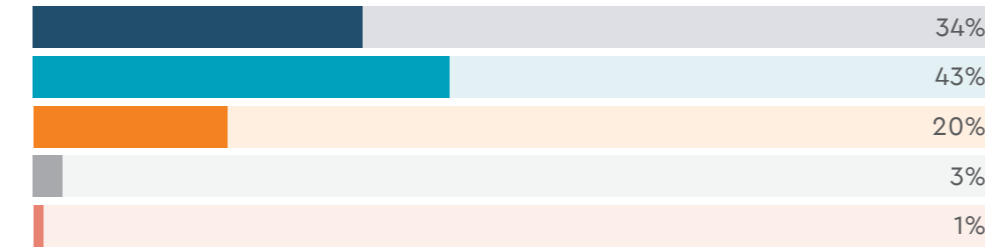


■ Increase dramatically ■ Increase ■ Stay the same as today ■ Decrease ■ Don't know

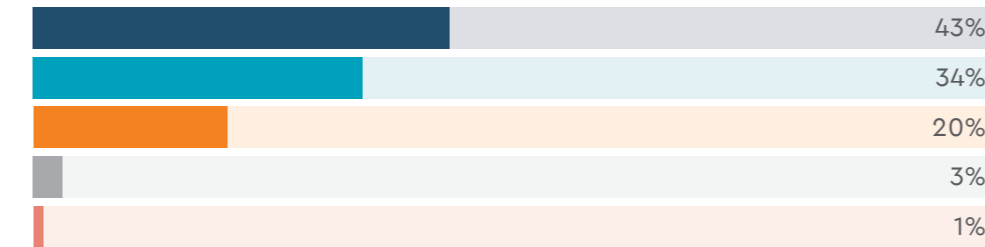
### Philanthropy



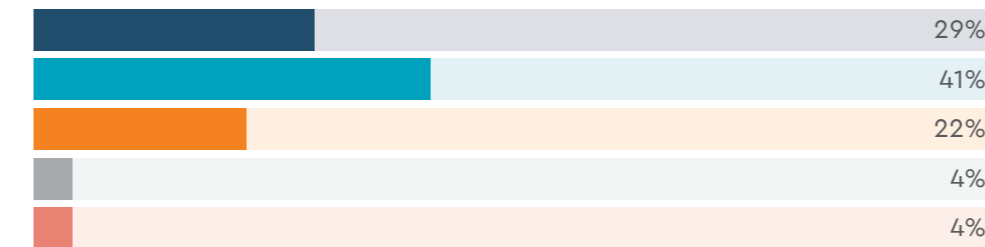
### A focus on private markets



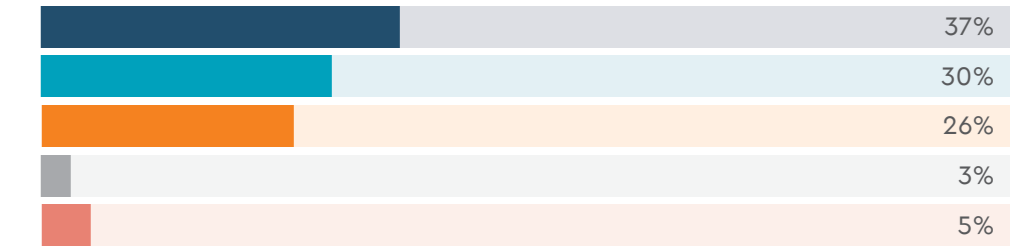
### Use of AI to inform investment strategy and decision-making



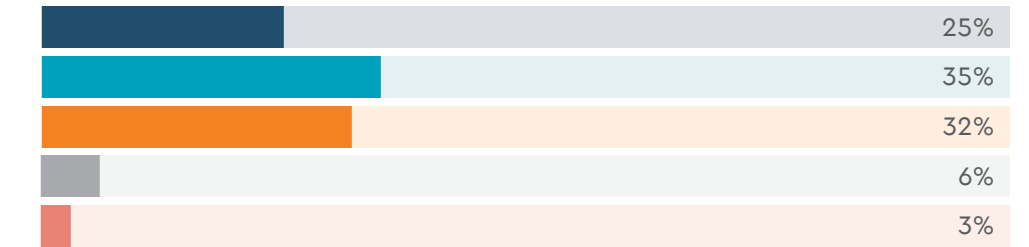
### M&A activity



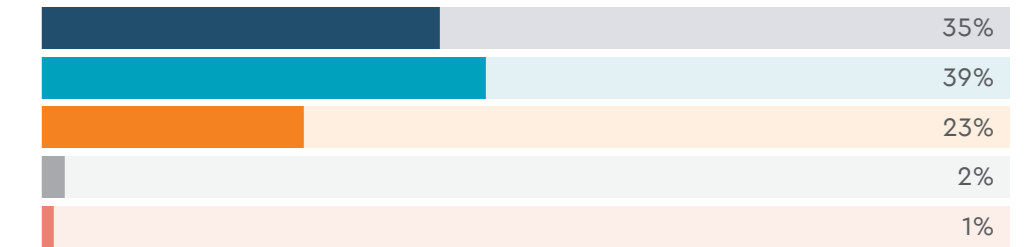
### Exposure to digital assets



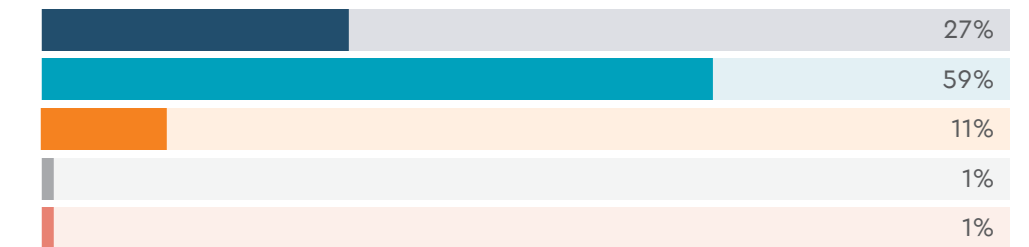
### Governance



### Investing in AI/technology



### Collaboration with other family offices



This reflects a broader transition: from reactive reporting to proactive, insight-led strategy.

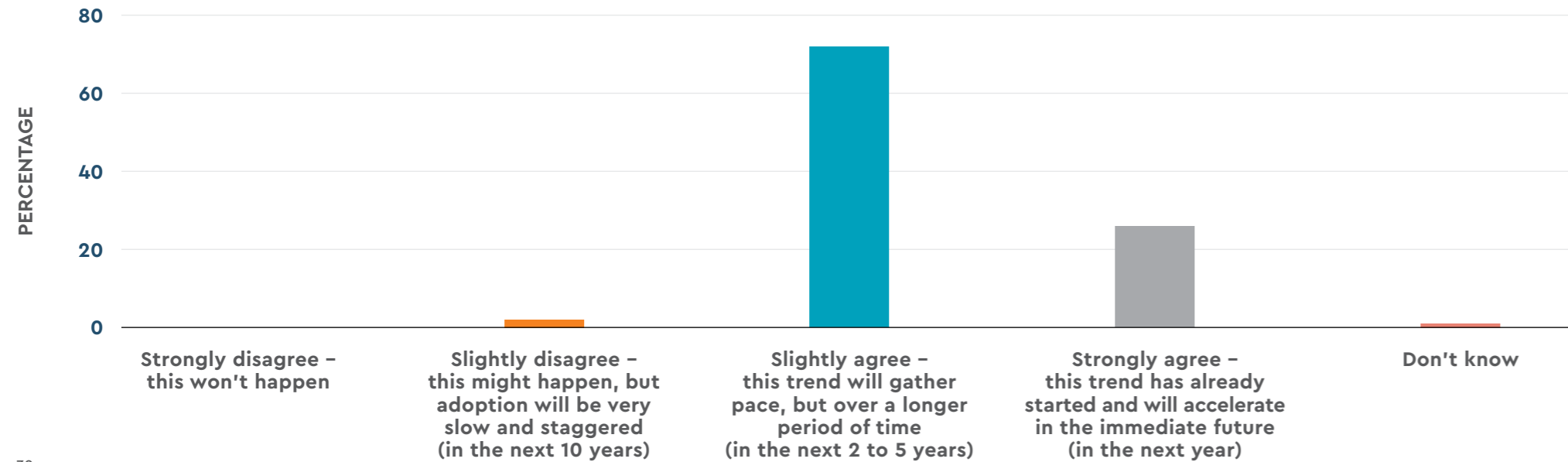
Leading family offices are responding by rebuilding their data foundations, leveraging modern technology platforms to move towards a single, centralised source of truth where data is standardised, validated and continuously updated. In practice, this often involves replacing manual processes with automated data aggregation, improving data validation controls, and establishing consistent data models across asset classes. The objective is not just efficiency, but confidence, ensuring that every decision is based on a complete and trusted view of the portfolio.

Better data does not just improve reporting, it transforms how decisions are made, enables faster responses to market changes, more informed asset allocation, and greater alignment across stakeholders.

### AI is only as powerful as the data behind it

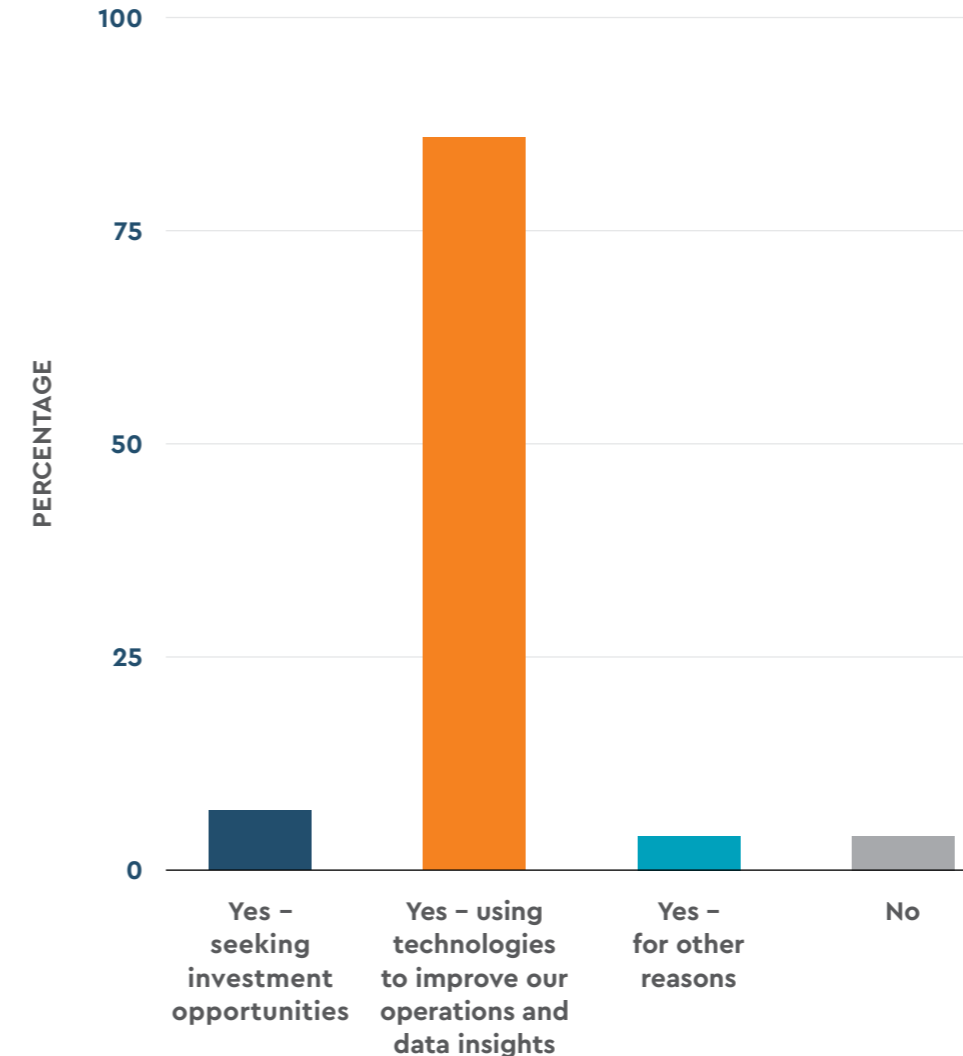
Artificial Intelligence is rapidly moving from concept to capability. Almost all respondents agree (26% strongly and 72% slightly that AI will reshape how family offices operate, enabling more agile processes, deeper data insights, and improved performance outcomes.

### AI will reshape how family offices are run, enabling more agile operations, improve data insights and ultimately drive-up performance, value and growth. To what extent do you agree with this statement?

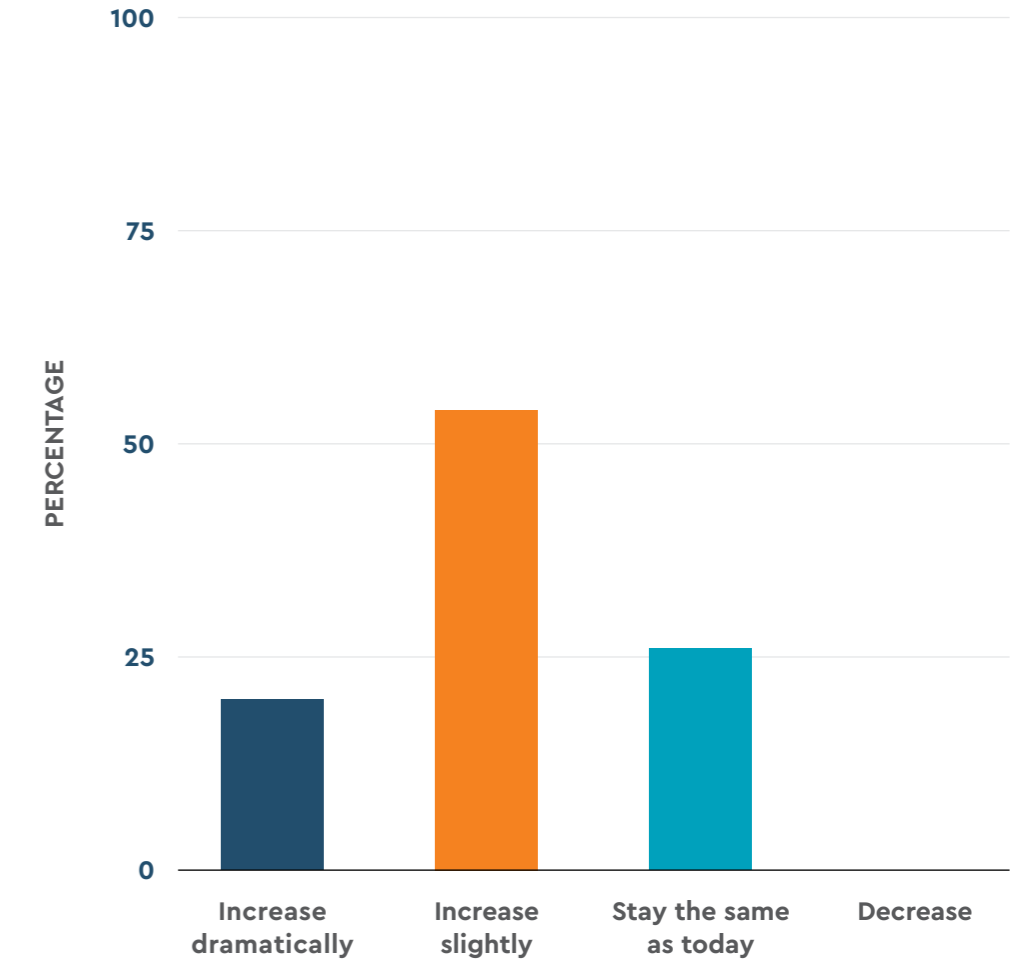


At the same time, nearly all survey participants are already seeking opportunities in AI and other disruptive technologies, with a further three quarters expecting this trend to grow over the next three years.

### Are you currently seeking opportunities in disruptive technologies such as AI and cryptocurrency?



### How do you see the trend of investing in AI, cryptocurrencies and other digital assets developing over the next three years?



# Landytech

But AI does not solve data challenges, it amplifies them.

Without clean, structured data, AI outputs become unreliable. With the right foundation, however, AI becomes a powerful tool for identifying patterns, surfacing risks, and modelling future scenarios. This is particularly valuable in private markets, where data is less frequent and less standardised. AI can help bridge these gaps, enhancing transparency and enabling more consistent analysis across otherwise fragmented datasets.

## Reporting: from backward-looking to decision-driving

This shift is being driven in part by capacity constraints. Around a third of family offices identify consolidated reporting across asset classes and data accuracy / timeliness as areas most challenged in delivering specialist expertise.

At the same time, 65% expect to increase their use of outsourced providers over the next three years for data management.

In this environment, reporting becomes the connective tissue across internal teams and external partners. It ensures alignment, transparency and faster decision-making.

But expectations are evolving. Family offices increasingly require:

- Real-time visibility
- Look-through across structures
- Integrated risk and liquidity analysis
- Forward-looking scenario modelling

Delivering this requires better data, not just better tools. It also requires the right technology infrastructure to automate processes, reduce manual intervention and deliver timely, decision-ready insights.

## Complexity is rising – so is the need for control

As portfolios expand into private markets and digital assets, complexity increases. At the same time, 63% of respondents identify ensuring effective data management, upgrading technology and embracing AI among their top challenges.

This creates a tension. Family offices want to innovate, but they also need control, visibility and resilience.

The solution is not to slow innovation, but to strengthen the foundations that support it.

## A new model for decision-making

What is emerging is a fundamentally different operating model, one where data is centralised, reporting is continuous and AI enhances human judgement.

For family offices, the message is clear. The ability to harness data effectively is no longer a competitive advantage, it's a prerequisite.

Those who invest in their data foundations today, supported by the right technology, will be better positioned to navigate uncertainty and support the next generation of decision-makers. Those who do not risk being constrained, not by lack of opportunity, but by lack of visibility.



# Governance structures and effective decision-making

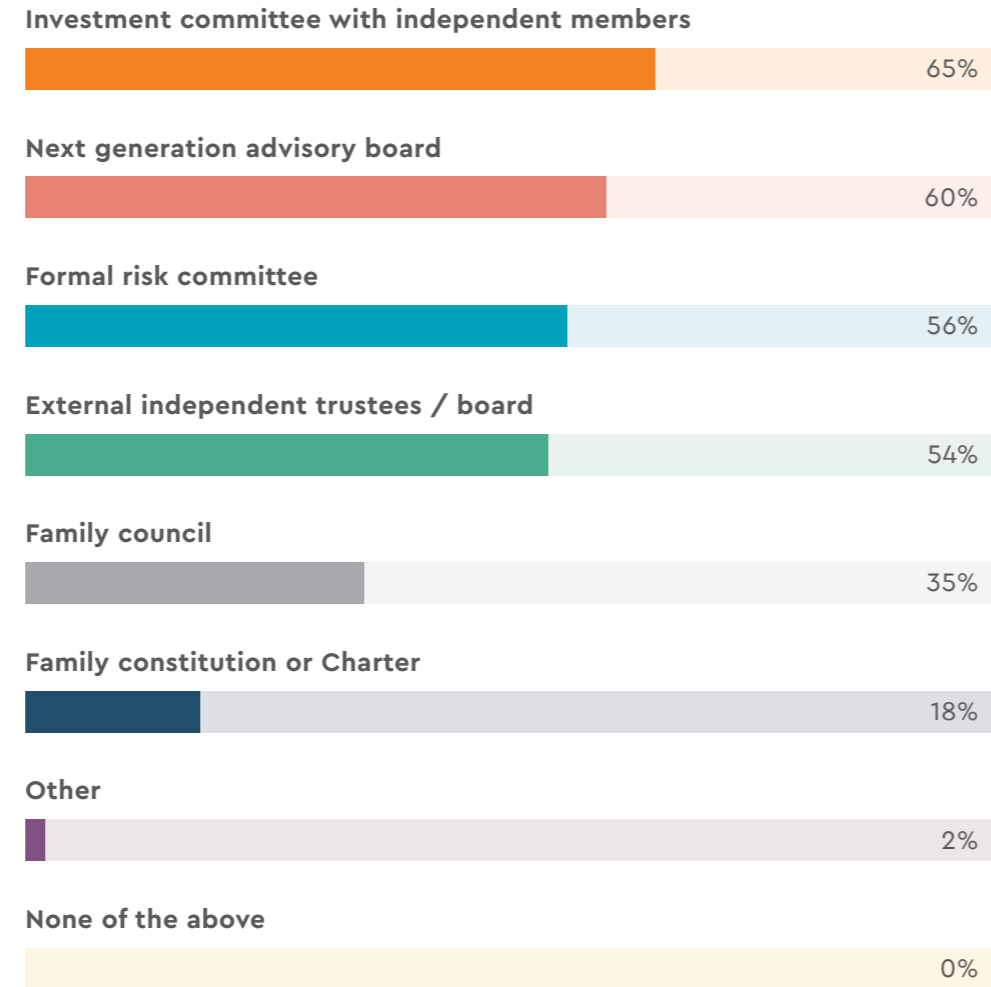
As family offices have grown in size and complexity, so has the need for robust governance.

Good governance is not just a consequence of size, but a valuable tool for family office professionals to have in their arsenal for a number of reasons. Meeting regulatory demands is an obvious one, as are legal requirements, but what might be less obvious, and is really the 'soft power' of good governance, is that this is a mechanism for ensuring family harmony, mediating difficult discussions and protecting family members from fluctuations in personal relationships.

We're seeing more and more family offices use governance frameworks as ways of enshrining best practice and sound recommendations made for the good of the family and its wealth and assets.

Our survey respondents shared which formal governance structures they have in place, with the most common being an investment committee with independent members (65%), followed by a next-generation advisory board (60%), a formal risk committee (56%) and external independent trustees or board (54%).

## What formal governance structure does the family office you work for have in place?



There's a clear correlation here between the challenges to family offices outlined in chapter 2, so we can see the success that professionals have had in devising and implementing formal governance to mitigate and combat threats to harmony and performance.

Committees and advisory boards also speak to a greater focus on effective decision-making conducted in a formal setting with specific guardrails.

As family offices have grown in size they have moved away from a single founder making decisions at their leisure; greater scale has necessitated an approach that factors in checks and balances alongside accountability, and indicates the ongoing professionalisation of the family office environment.

Good governance is not just about oversight, it is a mechanism for ensuring family harmony.

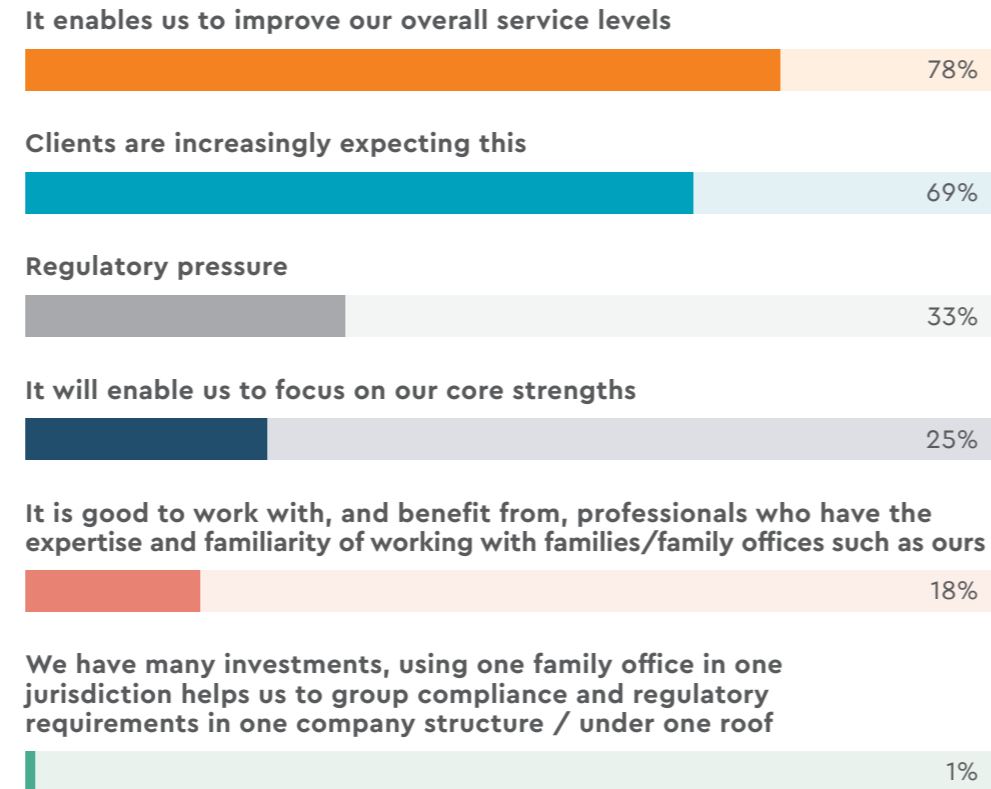
# The role of specialist service providers in supporting Family Office success

Many family offices were originally devised as a more practical solution to a family's private client needs; bringing everything under one roof and closer to the family would be easier, result in efficiencies and deliver the bespoke service the ultra-wealthy expect. But the cyclical nature of financial services is such that we now find ourselves in a situation where specialist, third-party service providers are an essential component of the family office ecosystem.

The very reasons that many family offices 'broke away' from larger providers 15–20 years ago are now cited by respondents to our survey as causes to employ them: third-party providers help improve overall service levels, 78% said, and perhaps even more surprising is that 69% said their end clients expect third parties to be involved.

Third-party providers help improve overall service levels, according to 78% of respondents.

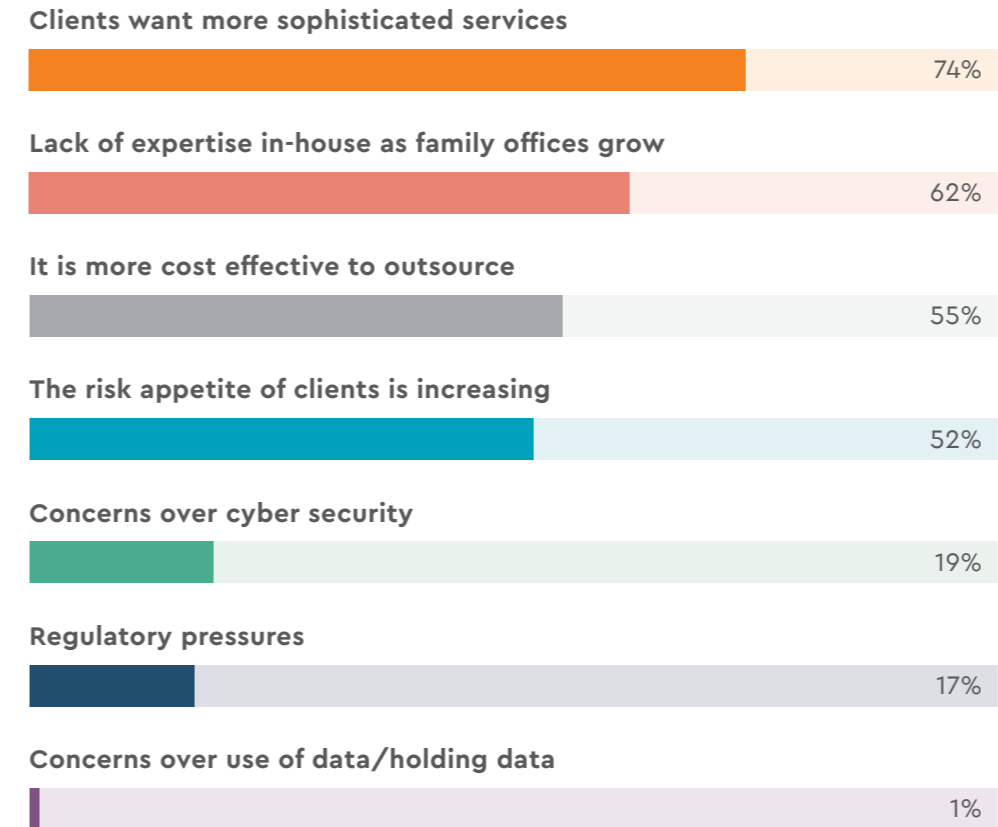
## If overall you expect to outsource more services to third parties, why is this?



Outsourcing isn't going away; 77% of respondents said the rate at which family offices outsource key services to third parties will increase dramatically (4%) or slightly (73%) over the next three years.

Why? As we've said throughout this report, clients want more sophisticated services, and third parties can help to meet this need. That was the main reason our respondents selected for the increase in outsourcing – with three quarters selecting it. Others were a lack of in-house expertise as the family office grows (62%), the cost effectiveness of outsourcing (55%) and increased client risk appetite (52%).

## If you think outsourcing will increase, why is this?



The points around more-sophisticated services and lack of in-house expertise go hand in hand; if clients' demands are increasingly niche, it's obvious that the family office generalist will need to go and find the specialist skillset required to deliver to standard. This isn't new of course, prudent trustees have been following that exact course for decades.

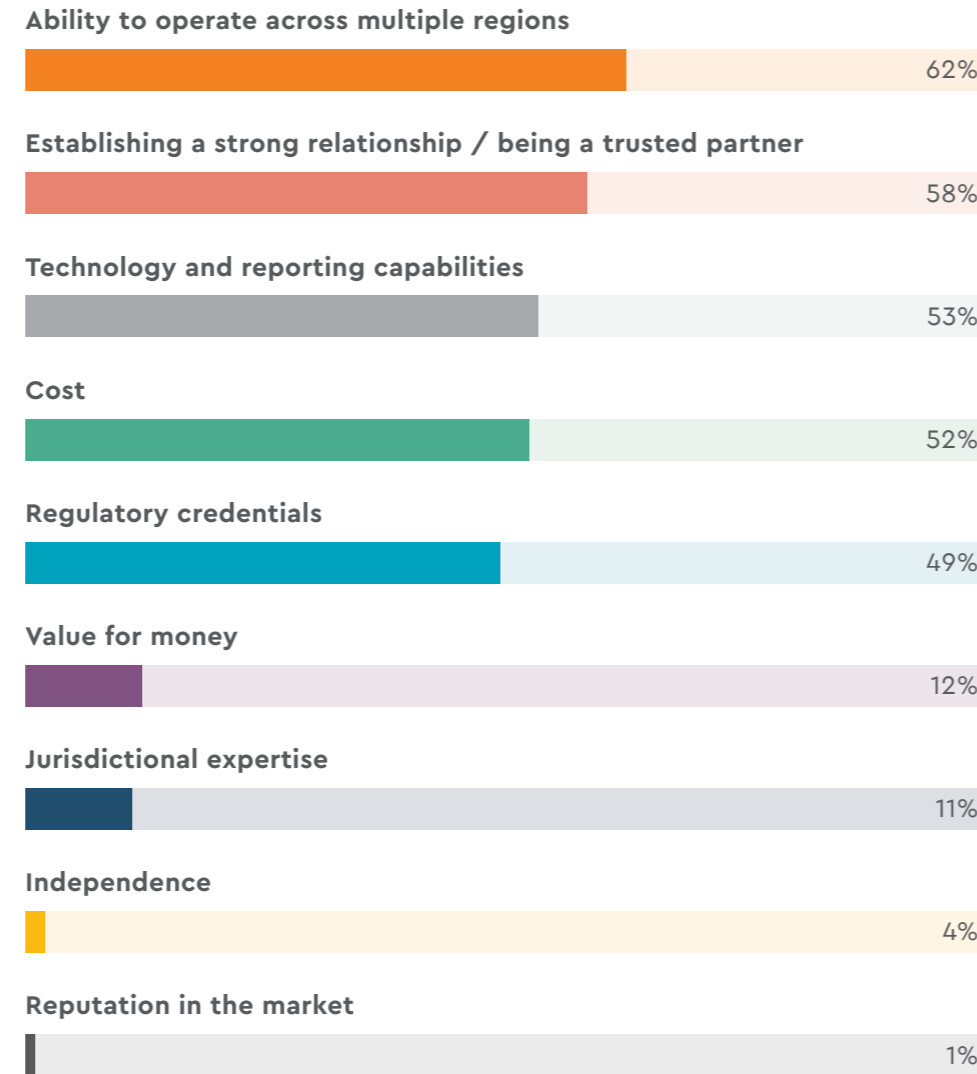
When we asked about the most-popular areas for family offices to seek third party support in, the answers were indeed niche: illiquid investments, cyber security and personal financial management came out on top – and all also featured highly on a list of areas where the rate of outsourcing is expected to increase.

What of the providers themselves? If third parties are needed, what are the criteria for selecting the right ones? This is clearly of growing importance for family office professionals, whose networks are being put to the test by their clients who want to see the right firms and people brought on board to be part of what, lest we forget, is still a deeply personal operation.

Which factors are most important when picking a partner, according to our research? Ability to operate across multiple jurisdictions was the most-popular answer (62%), followed by establishing a strong relationship/being a trusted partner (58%), technology and reporting capabilities (53%) and cost effectiveness (52%).

So there are practical considerations involved in selecting which firm is the right one to help ensure the future success of each individual family office, but the strength of the relationship is still highly important, showing once again that family offices remain in the realm of the personal, no matter how big they get.

## When looking to outsource services to third parties, what is the most important factor to you?



## Sophisticated end-to-end wealth structuring and administration solutions

Ocorian are experts in looking after complex, high-value structures for family offices, family businesses and ultra-high-net-worth individuals across the globe.

We cross borders to protect, preserve and administer our clients' financial affairs, offering sophisticated solutions regardless of where you or your assets are located or what stage of the wealth lifecycle you find yourself.

We remove administrative headaches, minimise friction, stay ahead of regulatory change and use tech-enabled solutions to ensure your wealth is safeguarded with accountability, so you can focus on what matters most.

## Ocorian Private client in numbers



11

Jurisdictions



50+

Years of experience



100+

Prominent family offices



200

Private Client team



**Landytech**

Tech enabled solutions



**Longevity**

Clients have worked with us for over three generations

# Ocorian's Family Office services



## Formation and administration of a Family Office

We provide formation and ongoing administration services for all types of Family Offices as well as in relation to the structuring and administration needs of the family assets.



## Resident and relocation services

We manage residency applications or work permit applications and visas for individuals, families and employees either inhouse or through partner firms.



## We partner with Family Offices

To enhance their treasury and accounting functions alongside offering specialist administration services to ensure the full range of assets are comprehensively managed.



## Trusts and foundations

Our comprehensive trust and foundation services are tailored to protect, manage, and preserve family wealth.



## Succession and legacy planning

We work with you to create a plan that solidifies your succession ambitions and ensures the right governance is in place for the smooth transfer of assets and leadership.



## Regulatory & compliance support

Our specialist regulatory and compliance team will assist you in navigating complex and evolving regulatory requirements, offering clarity and peace of mind.



## Working with an existing Family Office

We provide supporting services to established Family Offices tailored to what they need.



## HR support services

We provide HR services bespoke to you whatever your circumstances / objectives. This may include payroll, recruitment, staff management and ad-hoc support.



## Lifestyle and luxury assets

We ensure your lifestyle and luxury assets are managed appropriately and by professionals.



## Family governance

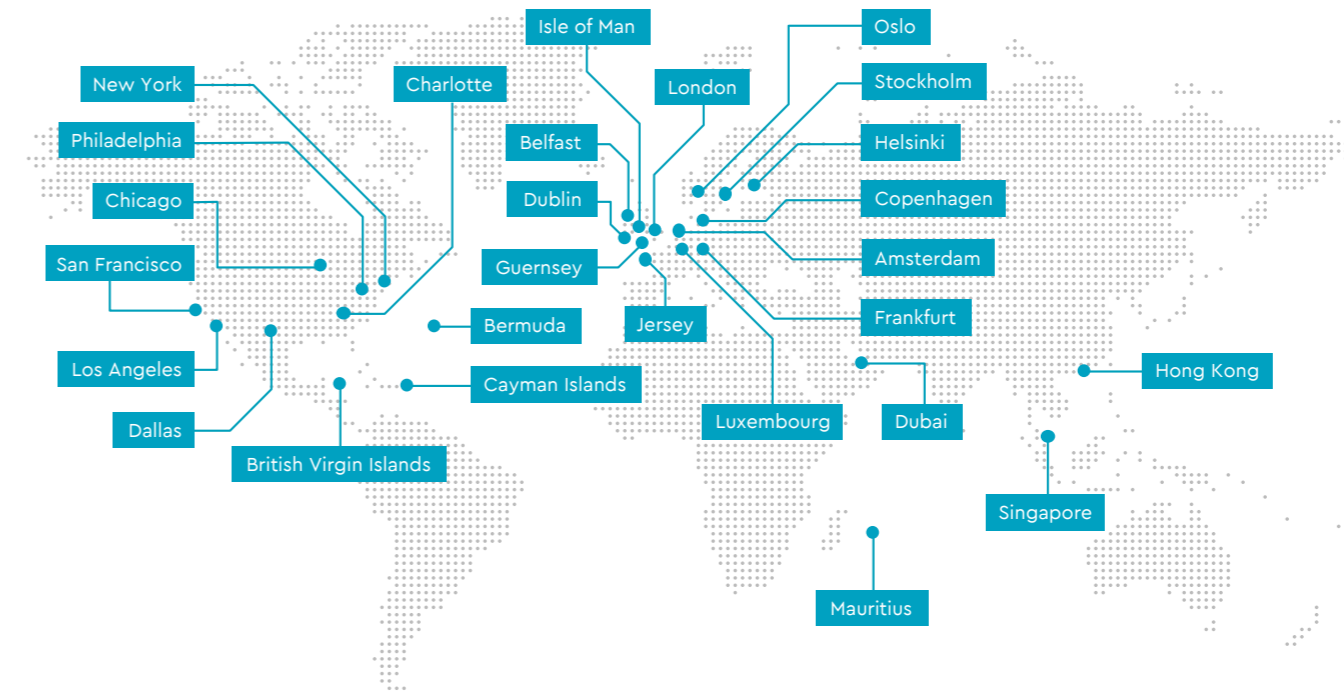
We implement family governance planning bespoke to a family's circumstances/objectives, e.g. establishing a charter, advising family members, philanthropy, and succession planning.

Discover how our wealth lifecycle journey can support you and your assets as they cross borders and grow



# About Ocorian

Here at Ocorian, we use our expertise, trust, and scale to manage and solve your complex operational, administrative and regulatory challenges, so you can focus on growing your business. That's why our solutions are trusted by asset managers, financial institutions, corporates, high net-worth individuals, and family offices, worldwide.



Fund Services | Regulatory & Compliance |  
Capital Markets | Corporate Services | Private Client

Find out more  
[ocorian.com](https://ocorian.com)

# Ocorian in numbers



**25+**  
Office locations



**2,000+**  
Staff worldwide



**20,000+**  
Structures under administration



**9,000+**  
Clients



**50+**  
Years of providing administration services



Contact  
our team

Fund Services | Regulatory & Compliance |  
Capital Markets | Corporate Services | Private Client



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